

Informatica[®] Cloud Application Integration November 2023

Salesforce and Application Integration

Informatica Cloud Application Integration Salesforce and Application Integration November 2023

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Preface

Use *Salesforce and Application Integration* to learn how to install the Salesforce Managed Package and run a guide within a Salesforce organization.

CHAPTER 1

Salesforce Managed Package

This chapter includes the following topics:

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Salesforce Managed Package Overview

You can use the Informatica Cloud Real Time for Salesforce package to:

- Integrate Application Integration with Salesforce.
- Test and publish a Salesforce connection in Application Integration to fetch the metadata from Salesforce.
- Work with Salesforce objects when you run a process.
- Work with Salesforce guides.
- Access Application Integration and Salesforce resources with a single sign-on.
- Use a Salesforce outbound message (OBM) that triggers an Application Integration process. For more information, see the Salesforce Outbound Messages topic in the System Services, Listeners and Connectors section of the Design guide.

Salesforce managed package URLs

The Salesforce managed package for Informatica Cloud Real Time version 1.26 uses version 56.0 of the Salesforce API.

You can install or upgrade to the latest managed package version 1.26.

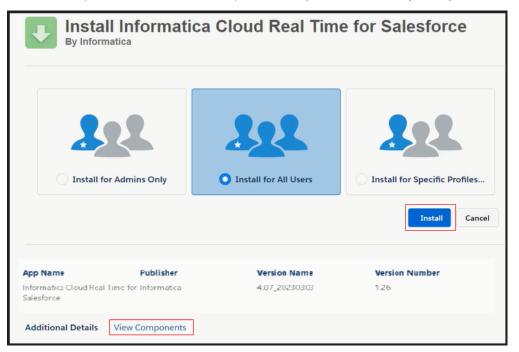
Log in to the following URLs to install or upgrade to the latest managed package:

 To install the latest version 1.26, use the following URL: https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5c00000007Tk To install the latest sandbox version, use the following URL: https://test.salesforce.com/packaging/installPackage.apexp?p0=04t5c00000007Tk

Installing the Salesforce Managed Package

Before you install the Salesforce managed package, make sure that your organization meets the following prerequisites:

- Your organization uses the Unlimited, Enterprise, Professional, or Developer edition of Salesforce. However, when you use the trial version which is the Professional edition of Salesforce, you might not be able to configure the managed package or connect to Salesforce. This happens because the API Enabled option is not available for the trial organizations. Informatica recommends that you use the Unlimited, Enterprise, or Developer edition of Salesforce.
- Salesforce APIs are enabled.
- You have administrative rights in the Salesforce organization where you want to install the managed package.
- 1. Depending on your business need, log in to your production or sandbox Salesforce developer account.
 - Production: <u>https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5c00000007Tk</u>
 - Sandbox: https://test.salesforce.com/packaging/installPackage.apexp?p0=04t5c00000007Tk
- Enter your Salesforce developer account user credentials.
 On the Install Informatica Cloud Real Time for Salesforce page, select one of the following options:
 - Install for Admins Only. Select this option to allow only admin users in Salesforce to run guides.
 - Install for All Users. Select this option to allow all users in Salesforce to run guides on the objects they work with. Most organizations grant access to all users.
 - Install for Specific Profiles. Select this option to configure custom security settings.



3. Optionally, click View Components to see detailed components of the managed package.

		Package Compo	nents		
Create	Run On Info	Guide_Executionc	Custom Field	This is a brand new component.	
Create	Use Connected App	AeCloudExtendSettingsc	Custom Field	This is a brand new component.	
Create	User	Guide_Milestonec	Custom Field	This is a brand new component.	
Create	Description	Guide_Definitionc	Custom Field	This is a brand new component.	
Create	Guide Design	Guide_Definitionc	Custom Field	This is a brand new component.	
Create	Starting User	Guide_Executionc	Custom Field	This is a brand new component.	
Create	Run On Type	Guide_Executionc	Custom Field	This is a brand new component.	
Create	Ending User	Guide_Executionc	Custom Field	This is a brand new component.	
Create	Run On	Guide_Milestonec	Custom Field	This is a brand new component.	
Create	Guide Execution	Guide_Milestonec	Custom Field	This is a brand new component.	
Create	Guide Name	Activity	Custom Field	This is a brand new component.	
Create	Run On Type	Guide_Milestonec	Custom Field	This is a brand new component.	
Create	Time	Guide_Milestonec	Custom Field	This is a brand new component.	
Create	Time	Guide_Milestonec	Custom Field	This is a brand new component.	
	Time Component Name			This is a brand new component.	_
Create Resources (18) Action	Component Name	Guide_MilestoneC Parent Object	Component Type	Installation Notes	_
Create Resources (18) Action Create	Component Name Home Guides	Parent Object	Component Type Home Page Component	Installation Notes This is a brand new component.	_
Create Resources (18) Action	Component Name		Component Type	Installation Notes	_
Create Resources (18) Action Create Create Create	Component Name Home Guides Guide Milestone Layout Guide Executions	Parent Object	Component Type Home Page Component Page Layout Custom Report Type	Installation Notes This is a brand new component. This is a brand new component. This is a brand new component.	
Create Resources (18) Action Create Create	Component Name Home Guides Guide Mitestone Layout	Parent Object	Component Type Home Page Component Page Layout	Installation Notes This is a brand new component This is a brand new component.	
Create Resources (18) Action Create Create Create Create Create Create	Component Name Home Guides Guide Ministone Layout Guide Erecutions AeGuideImage pro co41	Parent Object	Component Type Home Page Component Page Layout Custom Report Type Document Document Fider	Installation Notes This is a braind new component.	
Create Resources (18) Action Create Create Create Create Create	Composent Name Home Guides Guide Mitetotes Layout Guide Executions AeGuideImag pro	Parent Object	Component Type Home Page Component Page Layout Cuttom Report Type Document Document Static Resource	Installation Notes This is a brind new component. This is a brind new component. This is a brand new component.	
Create Create Create Create Create Create Create Create Create Create Create Create Create Create	Component Name Home Guides Guide Matterione Layout Guide Executions Aelbuidemage proj celet Aelbuidemage proj celet Autobioledate/Feriorces Guides	Parent Object	Composent Type Hone Page Component Page Layout Custom Report Type Document Folder Stack Resource Hone Page Component	Installation Notes This is a brain direk component. This is a traind new component. This is a traind new component. This is a braind new component.	
Create	Component Name Home Guides Guide Ministros Layout Guide Exections Ad Guide Exections due to the Component Ad Michiel StaticResources Guide Reports	Parent Object Guide_Milettone_6	Component Type Hone Fugic Component Page Lyout Custom Resort Type Document Document Static Resource Hone Fugic Component Report Folder	Installation Notes This is a bread new component.	
Create Create Create Create Create Create Create Create Create Create Create Create Create Create	Component Name Home Guides Guide Matterione Layout Guide Executions Aelbuidemage proj celet Aelbuidemage proj celet Autobioledate/Feriorces Guides	Parent Object	Composent Type Hone Page Component Page Layout Custom Report Type Document Folder Stack Resource Hone Page Component	Installation Notes This is a brain direk component. This is a traind new component. This is a traind new component. This is a braind new component.	
Create	Component Name Home Guides Guide Matterbei Layout Guide Exections Aufühlenspag proj ce-64 Aufühle/StatcResources Guide Reports Guide Reports Guide Reports	Parent Object Guide_Milettone_6	Composent Type Hone Page Component Page Layout Couton Report Type Document Document Document Batic Resource Hone Page Component Report Folder Page Layout	Installation Notes This is a brain direk component.	

4. Click Install.

5. Click **Done** after the install is complete.

If the installation takes a long time, a message appears stating that you will receive an email when the installation is complete. Click **Done**.

By Infor	all Informatic	a Clou	d Real	Time f	or Sa	ale	sfo	orce
	s app is taking a long t will receive an email after			eted.				
								Done
App Name	Publisher		Versi	on Name		,	/ersi (on Number
Informatica Cloud R Salesforce	teal Time for Informatica		4.07_3	20230303		1	.26	
								Help for this Page
					before deploying. Y	′ou can deplo	y the compo	nents Individually
n AppExchange you can browse, test drive, download ops and components are installed in packages. Any o sing the other features in setup or as a group by clickl epending on the links next to an installed package, yo o remove a package, click Uninstall . To manage your	custom apps, tabs, and custom objects are initially marked a dng Deptoy. rou can take different actions from this page.				before deploying. 1	/ou can deplo	y the compo	
In AppExchange you can browse, jest drive, download opp and components are installed in package. Any sing the other freatures in solup or as a group by clicki evending on the links next to an installed package, you or remove a package, click Uninstall . To manage your installed Packages	ustom apps, tabs, and custom objects are initially marked a dig Deploy. ou can take different actions from this page. package licenses, click Manage Licenses .	as "In Development" and are n	of deployed to your users. This	illows you to test and customize				Visit AppExchange
n AppErchange you can brever, leat drive, download ops and components are installed in packages. Any or sing the doter features in selay are as group by click expending on the links ned ba in installed package, yo encode a package. Also kick biostall . To manage you installed Packages Action Package hum	estom apps, tabs, and custom objects are initially marked a high Deploy. eru can take different actions from this page. package licenses, click Manage Licenses . Publisher				before deploying. Y	rou can deplo Apps	y the composition of the composi	
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AppExthange you can bravers, lest drive, download ops and components we institute in sackages, Anyr ong the other features in extual or as a group by citils ending on the lines meth an installed package, you remove a package, citik Uthinstall. To manage you installed Packages Action Package Innet Umstall & Balastoric Constitutes Package Description	cestom apps, tabe, and custom objects are initially marked of ing Dealor, or us make different actions from this page. • package licenses, click Manage Licenses. • Publisher Informatics Corp	Version Number 5.15 1.7	ot deployed to your users. This Namespace Prefix Informatica sf_corm_apps	illows you to test and customize Install Date 0205/2019 21:22	Limits	Apps 1	Tabs 1	Objects AppExchange Ready 0 Passed
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n AgeBichtinger you can brevers, fist drive, download opp and components are installed in a schage, and in the other Raiser and a proper by critical expending on the links need to an installed package, yo remove a spickage, citik Uninstall To manage your Installed Packages Action Peakage Hanne Uninstall Image Informatics Choose Uninstall Image Informatics Choose Uninstall Image Informatics Choose Description The package contains Connected Ages Description	cestom apps, tabe, and custom objects are initially marked of ing Deviloy. use can lake different actions from this page. - package licences, click Manage Licenses. 	Version Number 5.15 1.7 pplications such as Touch, Sale	ot deployed to your users. This Memospace Prefix Informatica \$f_com_apps estorce for Outlook, Sa	allows you to test and customize install Date 02/05/2019 21:22 26/07/2016 00:06	Limits	Apps 1 0	Tabs 1 0	Visit AppExchange Objects AppExchange Ready 0 Passed 0 Not Passed

Installed Packages page appears with the managed package under Installed Packages.

6. Click **All Tabs** at the top of the page.



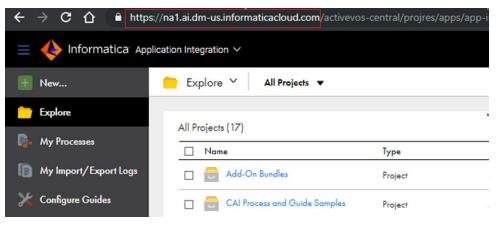
7. On the All Tabs page, click Guide Setup.

8. On the Registration Verification page, enter the Informatica Cloud Real Time Host URL.

To construct the Informatica Cloud Real Time Host URL, you will need the following values:

Cloud Application Integration URL

Log in to Informatica Intelligent Cloud Services[™] and select the **Application Integration** service. The URL portion that is highlighted in the following image is your Cloud Application Integration URL:



POD-specific Cloud Application URL

Use the POD-specific Cloud Application URL for Salesforce instead of the Cloud Application Integration URL. Otherwise, when you access Application Integration and the Salesforce organization linked to Application Integration simultaneously on two different browser tabs, you might encounter issues while publishing Application Integration assets.

Determine your POD-specific Cloud Application URL for Salesforce based on your POD and Cloud Application Integration URL. The following table lists the POD-specific Cloud Application URL for Salesforce that is applicable for various PODs and Cloud Application Integration URLs:

POD Name	Cloud Application Integration URL	POD-specific Cloud Application URL for Salesforce		
AP NorthEast 2	https://apne2-cai.dm- apne.informaticacloud.com	https://apne2-sfdc-cai.dm- apne.informaticacloud.com		
APJ/APSE1	https://apsel-cai.dm- ap.informaticacloud.com	https://apsel-sfdc-cai.dm- ap.informaticacloud.com		
AZ GERMANY	https://emc1-cai.dm1- em.informaticacloud.com	https://emcl-sfdc-cai.dml- em.informaticacloud.com		
AZ SINGAPORE	https://apsel-cai.dml- apse.informaticacloud.com	https://apsel-sfdc-cai.dml- apse.informaticacloud.com		
AZURE NTT	https://apnel-cai.dml- ap.informaticacloud.com	https://apnel-sfdc-cai.dml- ap.informaticacloud.com		
AZURE POD1	https://usw1-cai.dm1- us.informaticacloud.com	https://usw1-sfdc-cai.dm1- us.informaticacloud.com		

POD Name	Cloud Application Integration URL	POD-specific Cloud Application URL for Salesforce	
AZURE POD3	https://usw3-cai.dm1- us.informaticacloud.com	https://usw3-sfdc-cai.dm1- us.informaticacloud.com	
C360-Preview	https://uswl-cai.dmp- us.informaticacloud.com	https://uswl-sfdc-cai.dmp- us.informaticacloud.com	
CANADA	https://nacl-cai.dm- na.informaticacloud.com	https://nacl-sfdc-cai.dm- na.informaticacloud.com	
EMW1	https://emwl-cai.dm- em.informaticacloud.com	https://emwl-sfdc-cai.dm- em.informaticacloud.com	
GCP	https://uswl-cai.dm2- us.informaticacloud.com	https://uswl-sfdc-cai.dm2- us.informaticacloud.com	
POD1/ USW1/NA1	https://nal.ai.dm- us.informaticacloud.com	https://nal.sfdc-ai.dm- us.informaticacloud.com	
POD2/NA2	https://na2.ai.dm- us.informaticacloud.com	https://na2.sfdc-ai.dm- us.informaticacloud.com	
POD3/USW3	https://usw3-cai.dm- us.informaticacloud.com	https://usw3-sfdc-cai.dm- us.informaticacloud.com	
POD4/USE4	https://use4-cai.dm- us.informaticacloud.com	https://use4-sfdc-cai.dm- us.informaticacloud.com	
POD5/USW5	https://usw5-cai.dm- us.informaticacloud.com	https://usw5-sfdc-cai.dm- us.informaticacloud.com	
POD6/USE6	https://use6-cai.dm- us.informaticacloud.com	https://use6-sfdc-cai.dm- us.informaticacloud.com	
PREVIEW	https://usw1-cai.dmr- us.informaticacloud.com	https://usw1-sfdc-cai.dmr- us.informaticacloud.com	
UAE (Azure EMSE)	https://emsel-cai.dml- emse.informaticacloud.com	https://emsel-sfdc-cai.dml- emse.informaticacloud.com	
UK1	https://ukl-cai.dm- uk.informaticacloud.com	https://ukl-sfdc-cai.dm- uk.informaticacloud.com	

Organization ID

To view your Informatica Organization ID, log in to Informatica Intelligent Cloud Services and copy the Organization ID from **Organization** list shown in the following image:

Informatico	a Business Solutions PVT Ltd 🗸 🔶 📍 🧟 📍
	Org Name: Informatica Business Solutions PVT Ltd
	Org Id: 5p2CFQ2gzDsdkV1rghsBGw

Alternatively, you can select the **Administrator** service and then click **Organization**. Copy the Informatica Organization ID displayed in the **ID** field as shown in the following image:

= 🔶 Informatica Administrator ~							
🔒 Organization	Organization 🔒 Informatica Business Solutions PVT Ltd						
🔇 SAML Setup	SAML Setup Sub-Organizations						
🌄 Licenses	Overview						
Users	Name:*	Informatica Business Solutions PVT Ltd					
🔱 User Groups	ID:	5p2CFQ2gzDsdkV1rghs8Gw					
User Roles	Environment Type:	Production	-				
Runtime Environments	Description:						
Connections			12				
🖉 Add-On Connectors	Number of Employees:	Fewer than 10 employees	-				
🛐 Schedules							
🧼 Add-On Bundles	History						
Swagger Files	Created By:	ma					
🔂 logs	Created On:	Dec 2; 2018, 9:06 PM					

Construct the Informatica Cloud Application Integration Host URL by using the following format:

<POD-specific Cloud Application URL for Salesforce>,<Informatica Organization ID>

Enter the URL in the **ICAI Host URL** field.

For example, enter https://nal.sfdc-ai.dm-us.informaticacloud.com,5p2CFQ2gzDsdkVlrghsBGw as shown in the following image:

Informatica Cloud Application Integration for Sale Verification	sforce Registration Verify
Please enter the Information	a Cloud Application Integration Host information supplied by Informatica
ICAI Host URL	https://na1.sfdc-ai.dm-us.informaticacloud.com,5p2CFQ2gzDsdkV
	Verify

9. Click Verify.

The Informatica Cloud Services Authorization page appears.

Note: If your Informatica Intelligent Cloud Services organization was previously linked to another Salesforce organization, a warning message appears as shown in the following image:

Warn	Warning: Organization ID change confirmation				
	A different Salesforce organization associated with the target ICRT host URL is already in use.				
	If you confirm this login operation you will change the organization for the target tenant. Are you sure that you want to continue?				
	Confirm Cancel				

You can change the linked Salesforce organization when you install a managed package. For example, you have completed steps 1 through 8 to install the managed package in Salesforce organization A. However, your Informatica Intelligent Cloud Services organization B is already linked to a Salesforce organization C. If you click **Confirm** on the warning message, you link Informatica Intelligent Cloud Services organization A.

10. Enter your Informatica Intelligent Cloud Services administrator credentials and then click Log In.

Guide 5	and b		
Info	rmatica Clo	d Services Authorization	
Pleas	e provide ICS ac	lministrative credentials for your organizati	ion to link this Salesforce Organization to the Informatics Cloud Organization "eNIIdGHTU8YIkZEaaqNVY69". Note: Only one Salesforce Organization can be linked to an Informatica Organization for Guide Execution.
Usen	iame:	sonia.staging1	
Passi	vord:		
		Log In	

A confirmation message appears as shown in the following image stating that your Salesforce organization has been configured:

Guide Setup

Your Salesforce org has been configured for Informatica CAI. Click on Advanced settings to change the configuration.

Upgrading the Salesforce Managed Package

Perform the following steps to upgrade the Salesforce managed package:

- 1. Depending on your business need, log in to your production or sandbox Salesforce developer account.
 - Production: https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5c00000007Tk
 - Sandbox: https://test.salesforce.com/packaging/installPackage.apexp?p0=04t5c00000007Tk
- Enter your Salesforce developer account user credentials.
 On the Upgrade Informatica Cloud Real Time for Salesforce page, select one of the following options:
 - Install for Admins Only. Select this option to allow only admin users in Salesforce to run guides.
 - Install for All Users. Select this option to allow all users in Salesforce to run guides on the objects they work with. Most organizations grant access to all users.

• Install for Specific Profiles. Select this option to configure custom security settings.

	rade Informati	ca Cloud Real Ti	me for Salesforce
	earlier version is installe alled: 4.05_20190909 (1.25)	d. It can be upgraded while p New Version: 4.07_20230303 (
Install for	Admins Only	Install for All Users	Install for Specific Profiles
You're ins Partner Pr		ation that is not authorized for distribu	ution as part of Salesforce's AppExchange
I acknowledge tha Program.	at l'm installing a Non-Salesforce Apj	olication that is not authorized for distribut	ion as part of Salesforce's AppExchange Partner Upgrade Cancel
App Name	Publisher	Version Name	Version Number
Informatica Cloud Re Salesforce	al Time for Informatica	4.07_20230303	1.26
Additional Details	View Components		

3. Optionally, click View Components to see the detailed components of the managed package.

kage Components				
Pages (18)				
Action	Component Name	Parent Object	Component Type	Installation Notes
Update	Guide Setup		Visualforce Page	This is an upgraded component. It will be updated to the new version.
Update	Informatica Cloud Application Integration Advance	ed Options	Visualforce Page	This is an upgraded component. It will be updated to the new version.
Update	Sales Guide Launcher		Visualforce Component	This is an upgraded component. It will be updated to the new version.
Update	Escape vCard String		Visualforce Component	This is an upgraded component. It will be updated to the new version.
Update	Guides Listing		Visualforce Page	This is an upgraded component. It will be updated to the new version.
Update	Task Sales Guides		Visualforce Page	This is an upgraded component. It will be updated to the new version.
Update	Mobile Task Sales Guides		Visualforce Page	This is an upgraded component. It will be updated to the new version.
Update	Sales Guides		Visualforce Component	This is an upgraded component. It will be updated to the new version.
Update	Guide Items Listing - Internal		Visualforce Page	This is an upgraded component. It will be updated to the new version.
Update	Guides Listing		Visualforce Component	This is an upgraded component. It will be updated to the new version.
Update	Mobile Web Application		Visualforce Page	This is an upgraded component. It will be updated to the new version.
Update	AeGuideDefinitionDelete		Visualforce Page	This is an upgraded component. It will be updated to the new version.
Update	Guide API		Visualforce Page	This is an upgraded component. It will be updated to the new version.
Update	Guide List		Visualforce Page	This is an upgraded component. It will be updated to the new version.
Update	Provisioning Guides		Visualforce Component	This is an upgraded component. It will be updated to the new version.
Update	Guide Designer		Visualforce Page	This is an upgraded component. It will be updated to the new version.
Update	Execution Log Launcher		Visualforce Page	This is an upgraded component. It will be updated to the new version.
Update	Mobile Guide Viewer		Visualforce Page	This is an upgraded component. It will be updated to the new version.
Apps (3)				
Action	Component Name	Parent Object	Component Type	Installation Notes
Update	Informatica Cloud Application Integration Packag Connected App	pe for Salesforce	Connected App	This is an upgraded component. It will be updated to the new version.
Update	Informatica Cloud Application Integration Connec	ther	Connected App	This is an upgraded component. It will be updated to the new version.

4. Click Upgrade.

5. Click **Done** after the upgrade is complete.

Upgrade Informatica Cloud Real Time for Salesforce By Informatica						
i Upgr	ade Complete!					
			Done			
App Name	Publisher	Version Name	Version Number			
Informatica Cloud Rea Salesforce	Time for Informatica	4.07_20230303	1.26			

Note: If the upgrade takes a long time, a message appears stating that you will receive an email when the upgrade is complete. Click **Done**.

The Installed Packages page appears with the upgraded managed package under Installed Packages.

Installed Packages								Help for this Page
On AppExchange you can browse, test drive, download, and install pre-bui	It apps and components right into your s	alesforce.com environment	Learn More about Installing Pac	kages.				
Apps and components are installed in packages. Any custom apps, tabs, i using the other features in setup or as a group by clicking Deploy.	and custom objects are initially marked	as "In Development" and are	not deployed to your users. This	allows you to test and customize	before deploying."	rou can depli	by the compo	nents individually
Depending on the links next to an installed package, you can take different	actions from this page.							Visit AppExchange
Fo remove a package, click Uninstall . To manage your package licenses, o	lick Manage Licenses.							
Installed Packages								
Action Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects AppExchange Ready
Uninstall 📥 Informatica Cloud	Informatica Corp	5.15	Informatica	02/05/2019 21:22		1	1	0 Passed
Uninstall 📥 Salesforce Connected Apps	Salesforce.com	1.7	sf_com_apps	26/07/2016 00:06	1	0	0	0 NotPassed
Description This package contains Connected Applications for all the	officially supported Salesforce client ap	plications such as Touch, Sa	lesforce for Outlook, Sa					
Uninstall 📥 Cloud Extend	Active Endpoints	3.205	ce4sf20_001	09/05/2020 08:03		1	4	4 NotPassed
Description Informatica Cloud Extend for Salesforce Package								
Uninstall 📩 Informatica Cloud Real Time for Salesforce	Informatica	1.26	iert	25/07/2016 23:51	1	1	з	5 NotPassed
Description Informatics Cloud Application Integration Package for Sa	lesforce							

Uninstalling and Deleting the Salesforce Managed Package

The following steps detail the procedure to uninstall and delete the Salesforce managed package:

- 1. Log in to your Salesforce developer account.
- 2. Click Setup.
- 3. In the Quick Find / Search box, search for Installed Packages.
- 4. In the Installed Packages page, click Informatica Cloud Real Time for Salesforce.

Note: Before you uninstall the managed package, ensure that you delete all the artifacts that depend on the Informatica Cloud Real Time for Salesforce. For example, custom pages, buttons, page layouts, Visualforce pages.

5. Click Uninstall at the top of the page.

« Back to List: Installed Package	Real Time for Salesforce (Mana	aged)	
Installed Package Detail	Uninstall View Components	Become Primary Contact View Deper	ndencies
Package Name	Informatica Cloud Real Time for Salesforce	Version Number	1.24
Language	English	First Installed Version Number	1.24
Version Name	3.330_20171207	Package Type	Managed
Namespace Prefix	icrt	Modified By	8/16/2019 12:59 AM
Publisher	Informatica		
Description	Informatica Cloud Real Time for Salesforce Package		
Installed By	8/16/2019 12:59 AM		
Count Towards Limits	✓	Tabs	3
Apps	1	Objects	5

Package Details Informatica Cloud Real Time for Salesforce (Managed)

The Uninstalling a Package page appears with a list of all package components.

6. You can choose to save the package data for 48 hours after you uninstall the package. Click Uninstall.

Save a copy of this package's data for 48 hours after uninstall

Do not save a copy of this package's data after uninstall

Yes, I want to uninstall this package and permanently delete all associated components

Uninstall

If you do not delete all the artifacts that depend on the Informatica Cloud Real Time for Salesforce, the uninstallation might fail.

Uninstalling a Package

Problems				
Component Type	Name	Problem		
Visualforce Component	AeSalesGuides	Component is in use by another component in your organization. CustomButtonCA		
Connected App	CloudExtendConnApp	Component is in use by another component in your organization. CustomButtonCA		
Apex Class	AeSecurityTokenCE	Component is in use by another component in your organization. CustomButtonCA		

Delete the dependent artifacts and uninstall the package again.

7. After you uninstall the package, the Informatica Cloud Real Time for Salesforce package appears under Uninstalled Packages on the Installed Packages page and the status displays as In Progress.

Uninst	alled Packages				
Action	Package Name	Namespace	Expiration Date	Uninstall Status	Uninstall Date
	Informatica Cloud Real Time for Salesforce (Version Name 4.05_20190828)	icrt	8/31/2019 3:02 AM	In Progress	8/29/2019 3:02 AM

After the uninstallation is complete, the status displays as Uninstall Complete.

Uninstall	ed Packages				
Action	Package Name	Namespace	Expiration Date	Uninstall Status	Uninstall Date
Data Del	Informatica Cloud Real Time for Salesforce (Version Name 4.05_20190828)	icrt	8/31/2019 3:02 AM	Uninstall Complete	8/29/2019 3:02 AM

To delete the managed package, click **Del** under **Action**.
 A dialog box prompts you to confirm if you want to delete the managed package. Click **OK**.

More Information

To learn more, see the Using Salesforce System Services, Listeners and Connectors section under Design.

CHAPTER 2

Running a Guide within a Salesforce Organization

This chapter includes the following topics:

- Running a Guide within a Salesforce Organization Overview, 16
- <u>Connected Apps Guide Integration with Salesforce1 Mobile Applications, 20</u>
- <u>Accessing Data in Other Salesforce Organizations, 29</u>

Running a Guide within a Salesforce Organization Overview

To run a guide from within your Salesforce organization, create a guide in Application Integration and select a Salesforce object in the **Start > Applies To** property. You can open guides in Community Sites that are enabled with Salesforce enhanced domain.

Before you run a guide in Salesforce, you need to perform some tasks to prepare your organization.

Note: If you have migrated to the Informatica Intelligent Cloud Services[™], log in to Salesforce and verify that your guides are visible on the relevant Salesforce object pages. If you do not see your guides, log out of Salesforce, clear the browser cache, and then log in to Salesforce.

Step 1: Install the Salesforce Managed Package

Log in to Salesforce and install the Informatica Cloud Real Time for Salesforce package. The managed package connects your Informatica Intelligent Cloud Services and Salesforce accounts.

For information on how to install the managed package, see <u>"Installing the Salesforce Managed Package" on</u> page 7.

Step 2: Create a Salesforce Connection

Log in to Application Integration, and create and publish a Salesforce connection in the organization in which you have installed the managed package.

If your guide applies to a Salesforce object and you want to run the guide from Salesforce, ensure that the Salesforce connection associated with the guide has the unique name as **Salesforce**. To view the unique name, right-click the connection and select **Properties Detail**.

The following image shows the unique name for the connection:

Properties Detail for Salesforce

Basic	
Unique Name:	Salesforce
Publication Status:	 Published
Published On:	2019-07-23 11:29

Informatica recommends that you have a single Salesforce connection with the unique name **Salesforce** in the organization.

Note: Do not use the connection with the unique name **Salesforce** within a process that contains other Salesforce connections. Create a new connection with a different name, if needed.

For information about creating a Salesforce connection, see the Salesforce Connector Guide in the Connectors section of the online help.

Step 3: Create and Publish a Guide

Log in to Application Integration and create a new guide.

If you want to run a guide from Salesforce, the guide must be associated with a Salesforce object.

- In the properties section of the Start step, you must set the Start > Applies to property to a Salesforce object.
- 2. Save and publish the guide.

Note: If you set the property to Home, the guide appears on your Salesforce Home page.

The following image shows a guide that applies to the Salesforce Contact object:

Start Properties			
General	Applies To:	Contact (Salesford	ce) 🔻
Start	Run As:	Current User 🔻	(Salesforce Only)
Screens			
Input Fields			

Step 4: Set Up Salesforce to View Guides

To set up the Salesforce page of an object to view related guides, create a section in the home page of the Salesforce object and then add guides to the section.

- 1. Log in to your Salesforce account.
- 2. Click All Tabs and then select the object that you specified when creating a guide.

The object's Home page appears.

Contacts Home View: New Last Week	Jan Mari	
View: New Last Week Go! Edit Create N	vew view	
Recent Contacts	New	
Name	Account Name	
John Snow		
Reports		Tools
HTML Email Status Report		Sync to Outlook
Partner Accounts		Import Accounts & Contacts

3. Select the item for which you want to see Application Integration guides.

The item details page appears.

John Snow	Customize Page Edit Layout Printable View Help for this Page 🥝
Hide Feed Click to add topics:	
😰 Post 📲 File 🦧 New Task 🛛 More 👻	Follow
Write something Sha	
Q Show All Updates ~	No followers.

4. Click Edit Layout.

The Layout page appears.

Contact Layout -							
Save 🔻 Quick Save Preview As 🔻 Cancel 🛷 Undo 🐟 Redo 📻 Layout Properties							
Fields 🔺	Quick Find Field	Name)				
Buttons	→ Section	Asst. Phone	Created By				
Quick Actions	* Blank Space	Birthdate	Data.com Key				
Mobile & Lightning	Account Name	Clean Status	Department				
Actions Expanded Lookups	Assistant	Contact Owner	Description				
Related Lists							

5. Drag a **Fields > Section** onto the page layout area below.

The Section Properties dialog box appears.

Section Properties			×	
Section Name	Guides			
Display Section Header On C Detail Page Edit Page				
Layout		Tab-key C)rder	
		0-0	000	
1-Column 2	-Column 🔘	Left-Right	O Top-Down	
	OK Cancel			

6. In the Section Name field, enter Guides and then click OK.

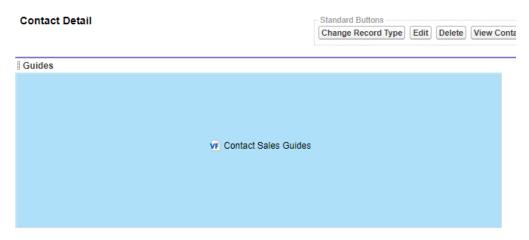
A section called **Guides** appears in the page layout of the object.

Contact Detail	Standard Buttons [Change Record Type] Edit] Delete View Contact Hierarchy] Clone Change Owner] Sharing Submit for Approval Check for New Data ('Card'	Buttons
i Guides		

7. From the top of the page, select Visualforce Pages and then select a guide.



8. Drag the guide on to the Guides section of the page.



All published guides that apply to this Salesforce object appear as links here. Click a link to run the guide.

Connected Apps Guide Integration with Salesforce1 Mobile Applications

With Guide Designer, you can integrate guides with your Salesforce1 mobile applications. This type of integration requires you to use the Salesforce managed package as a Connected App.

Before you start:

- Download the Salesforce1 app.
- Log in to the Salesforce1 app and verify that your environment is working correctly.

The integration requires the following steps:

- 1. Create a Visualforce page and enable it for Mobile Apps.
- 2. Create a new Action for the object in Salesforce.
- 3. Enable Publisher actions in Salesforce.
- 4. Put the new Action on the Salesforce object page.
- 5. Verify the Mobile App runs as expected.

Step 1: Create a Visualforce Page and Enable it for Mobile Apps

- 1. Log in to your Salesforce organization as a system administrator.
- 2. From the Setup menu, selectApp Setup > Develop > Pages.
- 3. Click New.
- 4. Enter a label, for example, aeOpportunityGuideMobileEnabled.
- 5. Check Available for Salesforce mobile apps.
- 6. Add the Visualforce markup as shown here:

Markup for a Home guide:

```
<are>capex:page sidebar="false" showHeader="false" standardStylesheets="false"
cache="true" expires="300" docType="html-5.0" >
<head>
<meta name="viewport" content="width=device-width, initial-scale=1,
maximum-scale=1.0, user-scalable=no" />
</head>
<body style="margin: 0px; padding:0px;">
<<u>icrt</u>:AeSalesGuides sfl="navigation" objectType="_any"
objectId="{!$User.Id}" extraInfo="Home Guides" nothingOnDone="true"
match="Role={!JSENCODE(SUBSTITUTE($UserRole.Name, ",", ""))},
Profile={!JSENCODE(SUBSTITUTE($Profile.Name, ",", ""))}" />
</body>
</apex:page>
```

Markup for an Account guide:

```
<apex:page standardController="Account" sidebar="false" showHeader="false"
    standardStylesheets="false" cache="true" expires="300" docType="html-5.0" >
    <head>
        <meta name="viewport" content="width=device-width, initial-scale=1,
            maximum-scale=1.0, user-scalable=no" />
        </head>
    <body style="margin: 0px; padding:0px;">
        <<u>iicrt</u>:AeSalesGuides sf1="publisher" objectType="Account"
        objectId="{!Account.Id}" extraInfo="{!JSENCODE(Account.Name)}"
        match="Role={!JSENCODE(SUBSTITUTE($UserRole.Name, ",", ""))},
        Type={!JSENCODE(SUBSTITUTE(Account.Industry, ",", ""))}"/>
        </body>
```

For other objects, adapt the Visualforce page code for the object you want to work with.

7. ClickQuick Save to verify that there are no errors.

Step 2: Create a New Action for the Object

- From the Setup menu, select the App Setup option for the object you want to work with. For example, App Setup > Customize > Opportunities > Buttons, Links and Actions.
- 2. Click New Action and add the Visualforce page created in Step 1.

Step 3: Enable Publisher Actions

- SelectApp Setup > Customize > Chatter > Settings.
- In the Publisher Actions section, check Enable Publisher Actions.

Step 4: Put the New Action on the Object Page

- 1. Select App Setup > Customize > Page Layout > Opportunity.
- 2. Click Edit. Locate the newly-defined action in the Actions list.
- 3. Drag and drop items to the location within the Publisher Actions section. This is before the Post Action.

Save • Quick Save	Preview As • Cancel	🔷 Undo 🔍 Redo	E Layout Properties			
Fields	Quick Find Actio	on Name 🛛 🗴				
Buttons	CE Process Apps	Mobile Smart Actions	New Event	New Task		
Actions	File	New Account	New Lead	Poll		
Expanded Lookups	Link	New Case	New Note	Post		
Related Lists	Log a Call	New Contact	New Opportunity	1		
Report Charts						
fieunifarea Danne	2					
Opportunity Sample						
Opportunity Sample Highlights Panel						
Highlights Panel	phis panel for this page I	ayout				
STALL ST.		layout				
Highlights Panel Customize the highli			r Case New No		vent Link	Poll
Highlights Panel Customize the highli Publisher Action	s New Task				vent Link	Poll
Highlights Panel Customize the highli Publisher Action Post File	New Task		/ Case New No		vent Link	Poll

and the second se								
Save * Quick Save Pr	eview As* Cancel	S Undo Redo	Layout Properties					
ields 📩	Q Quick Find Actio	n Name						
utions	CE Process Apps	Mobile Smart Actions	fleve Event	New Task				
ctions _	File	New Account	New Lead	Pull				
xpanded Lookups	Link	New Case	New Note	Post				
elated Lists	Log a Call	New Contact	New Opportunity					
inunHarra Baana				-			_	_
euntere Donne 👘				-	_			_
inunHarra Danna				-	_			
Sportunity Sample	ts panel for this page is	iyut	-	-	_	_		
Opportunity Sample Highlights Panel Customize the highligh	ts panel for this page is	iyout						
Sportunity Sample Highlights Panel	ts panel for this page is	iyout						
Customize the highligh	ts panel for this page in	iyout		iew Case	New Note	New Event	Link	Poll

4. Save the layout.

Step 5: Verify

Verify the newly added action in the SFDC1 mobile app.

- 1. Login to the mobile app.
- 2. Select an opportunity.

	₹▲ 🛢 2:3
Search Opportunities	
Recent Opportunities	New
All Opportunities	
2testSR1-230000095 Account Name : CE01	
New Opportunity Account Name : salesforce.com	
PortalOpportunity Account Name : Acme	
newopps Account Name : CE01	
testSR1-230000095 Account Name : CE01	
Acme-1500 Laptops Account Name : CE01	
FreshOpps01 Account Name : Bob Account	
\leftarrow	<u> </u>

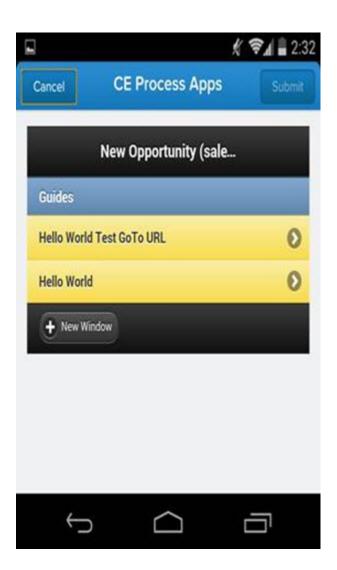
3. Press the "+" button that brings up the publisher actions, which includes the "CE Process Apps" action.

		() ? ,	2:31
=			
		200	
New O /Qualification • 23	oportun		
Guainication • 23/		21,000.00	,
•	• •		
Edit			•
Opportunity Owner			
Bob Test			
Close Date			
23/05/2013			
Opportunity Name			
New Opportunity			
Stage		ſ	
Qualification			+
ý (1

4. Press **CE Process Apps** to display the Designer Visualforce page. It may take a few seconds to load.



You should see the list of guides that are marked to run on a mobile device.



5. Choose one of those guides to see if it runs successfully.

	k	🔊 🖘 🔒 2:33
Cancel	CE Process Apps	Submit
	Hello World Test GoTo	
Hello Wor	ld - This is my first step	
Welcom	ne	
Continue	0	_
¢	\Box	

Creating a Salesforce1 App

- 1. Create a Visualforce Tab
- 2. Add it to the Mobile Navigation menu.
- 3. Add a new tab and add the Visualforce page you just created.
 - a. Select Setup > Create > Tabs.
 - b. In the Visualforce Tabs section, click New.
 - c. In the Visualforce Page drop-down list, select the page you created in the previous step.
 - d. In the Tab Label field, enter a label name. Note that, this label appears on the navigation menu in Salesforce1.
 - e. Click into the Tab Style field, and select some a style. The icon for this style appears as the icon for the page in the Salesforce1 navigation menu.
 - f. Click Next.
 - g. Click Next to accept the visibility defaults.

- h. Deselect the **Include Tab** checkbox so that the tab isn't included in any of the apps in the organization. You only want this tab to appear when users are viewing it on their mobile device.
- i. Click Save.
- j. On the Custom Tabs screen in the Visualforce Tabs section, click **Edit** next to the new tab that you created.

Edit Visualforce Custom Tab	
Fill in the fields below to define th	e Visualforce custom tab.
Custom Tab Definition Edi	t
Visualforce Custom Tab Info	ormation
Tab Label	CE Opportunities
Tab Name	CE_Opportunities
Content	aeOpportunityGuideMobileEnabled
Tab Style	📸 Building Block 😋
Mobile Ready	What Is This?
(Optional) Choose a Home Page Splash Page Custom Link	Custom Link to show as a splash page the first time your users click on this tab.
Enter a short description.	
Description	This is a test VF tab to verify CE Process Guides as a tab in SFDC1
	Save Cancel

- 4. Add the new tab to the navigation menu. Here, it is added as a navigation menu item. It will instantly become available to Salesforce1 app users that have access to it.
 - a. Select Setup > Mobile Administration > Mobile Navigation.
 - b. Select the newly added tab and click Add to move it over to the selected list in the right.

Available		Selected	
CE Opportunities	Remove Dash	ile ps t Search Items iy	
-	*		*

- c. Click Save.
- 5. When your Salesforce1 users log in, they'll see the CE Opportunities menu item in the navigation menu.

Test it out by opening the app. You should be able to open your side menu in Salesforce1 and see your Visualforce Tab in this menu
 Note: You might need to clear the cache for the app if the page does not display immediately.

Accessing Data in Other Salesforce Organizations

After the Salesforce connector is added to your managed package, you can access Salesforce objects from within guides and processes. If you need a guide or process in one Salesforce organization to access data in another, perform these additional configuration actions:

- Perform guide setup in the organization where you want to run the guides.
- Create an additional connection for any other Salesforce organization you need to access.
- In the guides that use Salesforce objects, the objects are from the primary guide's organization. Use the other connection(s) you added to access objects from the other organizations in your guides or processes.

CHAPTER 3

Techniques

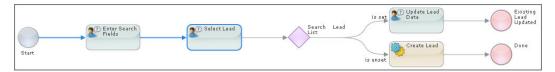
This chapter includes the following topics:

- Checking for Duplicate Leads and Contacts, 30
- Email Actions (Salesforce), 34

Checking for Duplicate Leads and Contacts

When entering a new lead or contact, you may want to check if it already exists. This topic demonstrates how to do this.

Here's what the completed guide looks like:



Step 1: Set Guide Properties

This is really the crucial step. The guide must access data of some kind but the fields do not exist into which they can be entered as the guide will not be associated with an object. You can create the fields that Guide Designer will use to store this data by using the *Guide Fields* tab.

		,	v		_	
General	Possible Outcomes	Guide Fields	Translate	Advanced	Notes	
uide that	ds are provided by the o t calls this as an embed from screens for use lat	lded guide. Terr	porary fields			
Input Fie	۶ld	Ту	pe		Require	ed
Search F	First Name	Т	ext	•		•
Search L	ast Name	Т	ext	•		۲
Search L	.ead List	0	bject ID	•)	•
0						
Output F	ïeld			Туре		
0						
Tempora	ry Field			Туре		
					0	K Cance

Now that these fields exist, you can insert them in steps and the data that users enter can be used in searches.

The three fields created are:

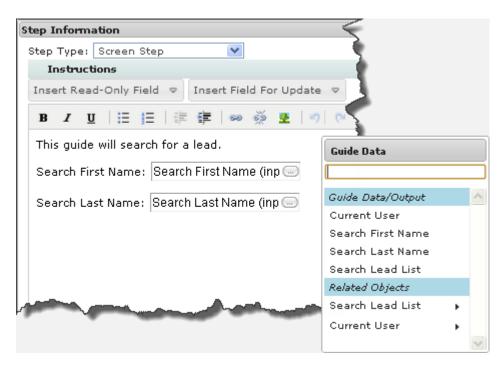
- Search First Name
- Search Last Name
- Search Lead List

Notice that the type of the first two is Text and the last is Object ID. Guide Designer searches for the name. If it is found, it also has the object ID associated with the name. This means that the person was found.

You will want also want to set to create a guide that is not directly associated with a Salesforce object. Also, you should place it on the Home page so that users will have a place from which they can launch it.

Step 2: Create a Screen Step for entering a name

Create a Screen Step into which a user can type a first and last name.



Insert two updateable fields using the picklist. Notice that the three fields defined in the *Guide Fields* tab are there.

Step 3: Create a screen step for selecting a lead

In this step, you will need to set an inserted field's properties, as is shown in the next figure.

Step Information	
Step Type: Screen Step	
Instructions	
Insert Read-Only Field ♥ In	sert Field For Update 🗢
B <i>I</i> <u>U</u> ≒ ⊨ ≣ ≢ €	■ ∞ 👾 星 ୭) (♥ 🔲 マ
Select the Lead to edit an exit	sting lead or press Continue to create a
	Field Properties X
Search Lead List 🛛 📼	Field: Search Lead List
	Show List: Object Query 💙
	Reference To: Lead
	Columns:
	Height (rows): Default Constant VNone Selected 🔍
	Value:
	Required:
(double click on field to change	Object Query ?
*Prompt: Select Lead Answers: Continue	Allows for querying an object. Object query is done by specifying zero or more expressions, as a where clause. The results of the query will be displayed as a table or as a dropdown, depending on the number of display columns used.
Preview	Name Source Where Clause Constant ♥ FirstName LIKE '%{linput.Search First Name}%' and LastName LIKE '%{linput.Search Last Name}%'
	Add Condition
	OK Cancel

The step will display a list whose contents come from an object query. This query uses the contents of the fields that were filled in within the previous step as part of the query's Where clause.

Don't be concerned about the information within the curly braces "{}". If you use the **Add Condition** dialog, Guide Designer adds them for you.

Condition		Guide Data		×
Field Name 🔍 Equals 💟 Field	*	Start typing to filter		
		Current User	~	- 1
		Search First Name		- 1
		Search Last Name		- 1
		Search Lead List		
		Related Objects	٤l	
		Search Lead List		10
		Current User		
the second se				
			 -	

After Guide Designer executes this step, it will show a four-column table. It will have the three columns entered within the Display Columns area and a fourth column containing radio buttons. If the lead is within the table, the user will select one of them.

Step 4: Was something returned?

After the previous step executes, it sets the value of the Search Lead List field. You can now add a decision step that tests if this field was "set" or "unset", indicating if something was or was not found.

Step Inform	ation
Step Type:	Data Decision Step 💌 🍃
Field:	Search Lead List 🗢
Answers:	
Answer 1:	is set
Answer 2:	is unset
	<
han have	
-	Call W

Step 5: Next Steps

All that is left is create the steps that follow the decision step. In this example, one branch is followed when the lead does not exist and the other for when it does.

Step Information	
Step Type: Screen Step	
Instructions	
Insert Read-Only Field ♥ Inse	Step Information
B Z ∐ 1 ⊟ 1 ⊟ 1 ≡ 6 ≢	Step Type: Create Title: Create Lead Action: Create Lead
First Name Search Lead List>Fi	Information Input Input Screen
Company Search Lead List>Co	Name Source Last Name* Screen Total N Oppose
Title Search Lead List>Title -	First Name Screen 💙 Title Screen 💙
	Company* Screen 💟 Email Screen 💟
and the second	Use this to provide more data for the step Add Input
ļ	had an and the second s

Email Actions (Salesforce)

This topic describes the email actions that Salesforce provides.

Send Email Using Template and Send Free-Form Email

The **Send Email Using Template** and **Send Free-Form Email** actions are very similar as they both send email. The difference between them is that a template contains the subject and body of the email while the free form requires you to add them.

- When using a template, you will need to specify either the object to take information from or the email address, but not both. If neither is specified, the email is sent to the address within the current object.
- If there is no template, you will need to add a subject and the email's body. Specify either the object or the email address, but not both. If neither is specified, the email is sent the current person.

Note: Unlike other steps, email steps cannot be rolled back either by selecting a step in the History or by you backing up to it. This is because the email is already sent. Also, if you do step back to this step or one executed prior to it, the email will again be sent.

Using **Send Free-Form Email** is often better than **Send Email Using Template** even when there's a template that meets your needs because using a template doesn't give your users any flexibility. However, there's a way to use a template and allow users to modify things. Do this by using the **Send Free-Form Email** Service Call step, and setting the source of email's body to **Screen**. Next, double click on the body's input field and then insert the email template so that it is the default value of the field. This default value can include fields of any object that is available from the guide. Your users will see the template shown in an HTML editor inside the step with its data inserted for field values used by the template.

You can add attachments to an email. While all attachments are files, Salesforce differentiates attachments by where they exist and how they are used:

- Attachment Attachment: The files named in Salesforce attachment lists. These lists appear in the detail pages of some objects. These attachments can include feed attachments.
- **Content Attachments**: Shared and published corporate files. These files are typically shared with coworkers or sent to customers. For example, they could be Google Docs.
- **Document Attachments**: Web resources that others from your site have placed on the Web. Some of the kinds of information that are contained within documents attachments are logos, graphics, and template files.
- File Attachments: Files that you upload. While these are initially private files, they can be shared with coworkers.

Email iCal for Event Action

This action sends a calendar invitation by email (in iCalendar format) for the meeting created as a Salesforce Event. The dates and times are the same as the dates and times of the event. The email recipients who can log in to your Salesforce site receive an iCalendar file that contains a link to the **Event** within Salesforce. The Salesforce user to which the event is assigned receives a link that when clicked starts the guide for the event.

tep Infor	nation			
Step Type:	Ser	vice Call	~	*
Title:	Send E	mail iCal Fo	r Event	
Action:	Salesfo	orce > Emai	I > Send Email iCal For Event ♥	
Informa	ation	Input 1	Input Screen	
Send E	imail iO	al For Eve	ent	
locatio recipie the inv link to descrip	the mee n, dates ints that itation. the guid	eting repres s and times : are Salesfo The User th	lar invitation by email (as an iCal attachment) for ented by a Salesforce Event. The subject, will be the same as the Event's. The email orce Users, will get a link to the Event object in at the event has been assigned to will also get a r for the event. The invitation will also contain the	III
Name		Туре	Description	
Event		Object ID	Reference[Event]	
Send t assigne	o ed user	Checkbox	If checked, the email will be sent to the email address on file for the user the event is assigned to.	
Send to Contac Lead	-	Checkbox	If checked, the email will be sent to the email address on file for the Lead or Contact that this event is for.	-
Preview		- 	OK Cancel Apply	

The **Email iCal for Event** Service Call step uses up to six fields. The first four are required. The final two are optional. The following figure shows these fields on a step's Input tab.

	Service Call 🔻
itle: Sen	d Email iCal For Event
Action: Sale	esforce > Email > Send Email iCal For Event 🗢
Information	Input Input Screen
Name	Source
Event	Field Click To Select Field ♥
Send to assigned user	Constant 🔻 🔲
Send to Contact or Lead	Constant 🗸 🔲
Send to Other Invitees	Constant 👻 🔲
Use this to	provide more data for the step
Add Input	

These fields are:

• **Event**: The object ID that is a reference to an event. Process Designer will provide this ID. In this figure, the ID is that of the current Activity ID. You can, of course, select another field; for example, you can also select the ID for other events.

Step Infor	mation	
Step Type:	Service Call 👻	
Title:	Send Email iCal For Even	t
Action:	Salesforce > Email > Se	nd Email iCal For Event 🗢
Inform	ation Input Input S	Screen
Name	Source	
Event	Constant 👻N	one Selected
Send to assigne user		Lookup Event X
Send to Contac Lead		Go! Use * as a wildcard in place of any character
Send to Other Invitee	Constant 👻 📃	
	s to provide more data fo	r t
Preview		Alternatively:
	J	Clear Salesforce:Event Reference

You can also use a query to select the event.

- Send to assigned user: If checked, the email is sent to the email address stored within Salesforce for the user to which the event is assigned.
- Send to Contact or Lead: If checked, the email is sent to the email address stored within Salesforce for the lead or contact that this event is for.
- Send to Other Invitees: If checked, the email is sent to the email addresses stored within Salesforce for the users, leads or contacts that are listed for this event.
- Other Recipients: A semicolon separated list of email addresses of other people you would like to attend the event.
- Body: Optional text that is inserted into the email after any links that are sent.

CHAPTER 4

Customizing Salesforce

This chapter includes the following topics:

- Customizing and Creating Salesforce Pages, 39
- Attributes to Customize Salesforce Pages with Guide Designer, 42
- Creating a Button or Link to Launch a Guide, 43
- Running a Guide When the User Clicks New, 49
- Adding Guide Areas to Salesforce Pages, 50
- Implementing Service Steps and Search Services, 55

Customizing and Creating Salesforce Pages

You can use Visualforce page definitions for most of the common Salesforce objects. However, you may use other objects from which you want to launch guides or you may create your own. This topic discusses how to create and use a Visualforce page. This example will use the CampaignMember object. This process is straight forward and only contains three steps. If you are using version 27 of the Salesforce API, please read the note at the end of this topic.

Note: See <u>"Adding Guide Areas to Salesforce Pages" on page 50</u> for a more complete discussion as this section omits some of the details shown there.

1. Create the Campaign Member Sales Visualforce Page. The markup you will add is:

```
<apex:page standardController="CampaignMember">
<icrt:AeSalesGuides objectType="CampaignMember" objectId="{!
CampaignMember.Id}"/>
</apex:page>
```

Expand All Collapse All	Visualforce Page
Force.com Home	Page Edit Save Ouick Save Cancel Where is this used? Component Reference
System Overview	Page Information = Required Information
Personal Setup My Personal Information Email Import Desktop Integration My Chatter Settings	Label Campaign Member Sales Campaign Member Sales Description Visualforce Markup Version Settings
App Setup Customize Create Develop Apex Classes Apex Triggers Apex Triggers Apex Test Execution API Components Custom Settings Email Services Pages Sites Static Resources Tools Remote Access	<pre> A A A</pre>

2. After you save the Visualforce Page, edit the page layout for the Campaign Member:

Campa	aign Member Page La	ayout					
This page allows you to create different page layouts to display Campaign Member data. After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.							
Campaig	n Member Page Layouts	ew Page Layout Assignment					
Action	Page Layout Name	Created By	Modified By				
Edit Del Campaign Member Page Layout Bob Released, 10/28/2011 10:40 AM Bob Released, 10/28/2011 10:40 AM							

3. Add the new page to a section in the page layout:

Campaign Member Pag	ie Layout v
Save V Quick Save Previe	ew As 🔻 Cancel 📀 Undo 🖪 Redo 💼 Layout Properties
Fields Buttons Visualforce Pages	Quick Find Page Name * * Section * * Blank Space * Campaign Member S *
Campaign Member Sam	ple
Highlights Panel	
Customize the highlights	panel for this page layout
Campaign Member	Edit Delete Clone Create Opportunity Custom Buttons
Campaign Member Info	ormation (Header visible on edit only)
* Campaign	Sample Campaign
* Contact	Sample Contact
* Lead	
* Status	
Responded	\checkmark
Detail Information (Hea	ader not visible)
🖻 Company (Account)	Sample Company (Account)
🖻 Title	Sample Title
🖻 Phone	1-415-555-1212
🖻 Email	sarah.sample@company.com

Salesforce API, Version 27

If you are using version 27 of the Salesforce API and are creating a Visualforce page to embed an AeSalesGuides Visualforce component using code similar to the following:

Salesforce displays the following error:

Error: <apex:attribute assignTo> cannot be same as the <apex:attribute name> (objectId)

This error prevents you from creating new Salesforce pages that have guides.

The following is copied from

http://salesforce-walker.blogspot.com/2013/02/sprin-13-release-notes-in-visualforce.html:

Compile-Time Checking for Custom Component Attribute Names:

In the Spring '13 release, there is a new compile-time check that prevents giving custom Visualforce component attributes the same name as the assignTo value (which can refer to a property or method in the component's controller). This checking prevents a number of programming errors (bugs) that can result in runtime errors. This change is versioned, and you must update your Visualforce components and the pages that contain them to API version 27.0 to enable the new behavior. Previously, it was possible to create a custom component with an attribute that had the same name as the assignTo value.

For example:

```
<apex:component>
<apex:attribute name="currentpagename" type="string"
assignTo="{!currentpagename}"
description="This component can't be saved."/>
```

This component is no longer allowed.

</apex:component>

Force.com Visualforce:

To make this component compile under API version 27.0, change either the attribute name or the assignTo value (which might require you to also change a controller method or property). For example:

```
<apex:component>
<apex:attribute name="thepagename" type="string"
assignTo="{!currentpagename}"
description="This component saves just fine."/>
This component is OK!
</apex:component>
```

Note: Both components, as well as the pages they are displayed on, must be updated to API version 27.0 to enable the new compile-time check.

Attributes to Customize Salesforce Pages with Guide Designer

You can use the following attributes when interacting with Visualforce pages in Guide Designer. For example, see <u>"Customizing and Creating Salesforce Pages" on page 39</u>

Name	Туре	Description	
alwaysNewGuide	Boolean	Using this flag avoids any correlation with other running guides so guides that open always start from the beginning.	
closeOnDone	Boolean	True if a the window is closed when a user clicks done. This is used when a guide is launched in its own window.	
entrylds	String	omma-separated list of entry IDs to be displayed.	
extraInfo	String	r reporting purposes, extra info to be displayed in Informatica Cloud Real Time ports goes here.	
guideName	String	ames the guide that will be displayed.	
height	String	Optional height of the guide area iframe. If you do not use this attribute, the default vill be 100 percent of its container.	
id	String	An identifier that allows the component to be referenced by other components in the page.	
match	String	Comma-separated list of tags that are displayed. Guides that don't contain one of these tags are filtered out of the list for the user. This allows for both static and dynamic filtering as tags can be field values for example Status:Warm.	
nothingOnDone	Boolean	Indicates that the browser page is to stay where it is when the user hits Done. Note , however, the tab for the finished guide is closed.	
objectId	String	The ID of the object to be used as the context of the guides; for example Account.Id for use accounts. This parameter is required.	

Name	Туре	Description	
objectType	String	The type of record the guides is used with; for example, set to ${\tt Account}$ when used with accounts. This parameter is required.	
openIfOne	Boolean	If there is only one guide to display, open it and do not show the Guide Navigator. Note: This is always true if a guideName attribute is set, regardless of this setting.	
rendered	Boolean	Boolean value that specifies whether the component is rendered on the page. If it i ot specified, this value defaults to true.	
showCategories	Boolean	Turns displaying tags as categories on when true. Tags containing equal signs and tags beginning with a period are never shown.	
topLevelWindow	Boolean	If false, shows the 'open in new window' link. True means the Guide Navigator is a top level window. Default is false.	
useResponsive	Boolean	Using this flag when loading a named mobile guide on a desktop or tablet allows it to run.	
width	String	Width of the guide area iframe. If you do not specify a value, the default is 100 percent of its container.	

Creating a Button or Link to Launch a Guide

This topic describes how to create a button or a link that launches a guide from a Salesforce object. The steps for doing this are:

- 1. Create a Visualforce page.
- 2. Update the Visualforce page's security settings.
- 3. Create a button (or link) for the desired Salesforce object.
- 4. Add the button (or link) the object's page layout.

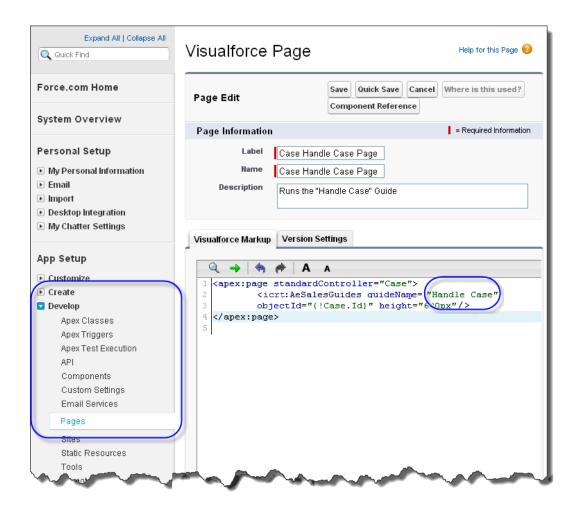
An example is used to show these steps. In this example, a button is added that launches the Handle Case guide. Here is the General tab of the **Guide Properties** dialog for this guide:

General P	ossible Outcomes	Guide Fields	Translate	Advanced	Notes
Name:	Handle Case				
Applies To:	Case 🗸				
Description:	Guide the end use				.41
Tags:	Enter tags, use cor	nma to start nex	t tag.		
	Desktop/Tablet 🖣				
Run On:					
Run On:					

Creating a Visualforce Page

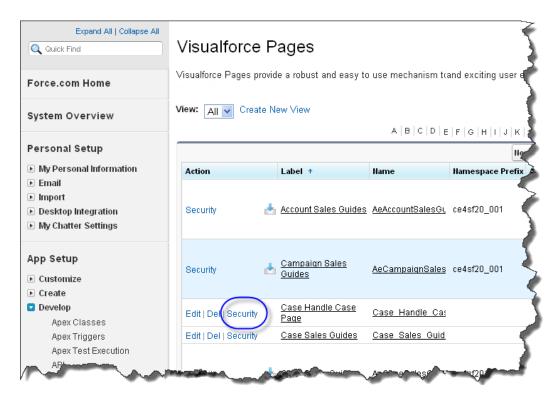
Set the Visualforce Markup to:

Note: Make sure that the guide's Name value here matches the name set in the Guide Properties dialog.



Update the Security for the Visualforce Page

Click the **Security** link for the page you just created:



Add one or more profiles displayed within the Available Profiles list to the Enabled Profiles list.

Save					
Available Profiles			Enabled Profiles		
Authenticated Website Content Only User Contract Manager Customer Portal Manager Customer Portal Manager Custom Customer Portal Manager Standard Customer Portal User Force.com - One App User Gold Partner User Marketing User Read Only Standard Platform User Standard User	~	Add Remove	High Volume Customer Portal User Solution Manager System Administrator		

Save your changes.

Update the Page Layout

Select **Cases** | **Page Layouts** on the left. On the Case Page Layout page, click edit to display the page onto which you will be placing the button (or link).

Note: To add custom links to the page layout, select the Custom Links category on the palette and drag one or more custom links from the palette to the Custom Links section on the page layout.

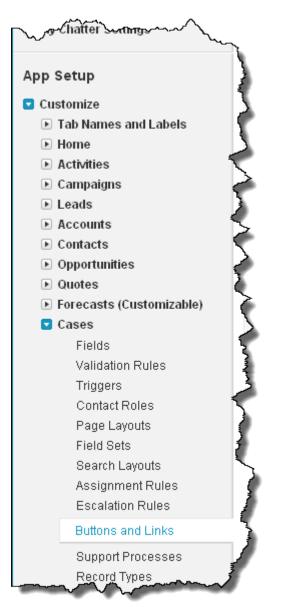
Notice that Buttons is selected on the left, not Visualforce Pages, which is the entry after this one.

	review As▼ Cancel	🔊 Undo 💊 Redo 📃 Layout Properties
Fields	Quick Find Bu	itton Name 🔹
uttons	Clone	Handle Case
isualforce Pages	Close Case	Sharing
Related Lists	Delete	Submit for Approval
	Edit	
ase Sample		
Case Sample Case Detail		Standard Buttons

Save your changes.

Create a Button on the Salesforce Page

Within the Custom Buttons and Links area, press New to create a new button.



Set the button's details similar to the following. Notice how **Detail Page Button**, **Behavior**, and **Content Source** are set. **Content Source** must be set to the Visualforce page that you created earlier.

ase Custom Button or Link New Button or Lin	nk	Help for this Page 🥑
Custom Button or Lin	k Edit Save Quick Save Preview Cancel	
Label Name Description	Handle Case Handle_Case I	Ouick Tips • Getting Started • Sample Buttons & Links • Operators & Functions
Display Type	 ○ Detail Page Link <u>View example</u> ⊙ Detail Page Button <u>View example</u> ○ List Button <u>View example</u> 	
Behavior	Display in existing window with sidebar	
Content Source	Visualforce Page Content Case Handle Case Page [Case_Handle_Case_Page]	
	Save Quick Save Preview Cancel	

Note: The way in which you create a link is similar; just select **Detail Page Link** instead of **Detail Page Button** and then use link in place of the button in the instructions that follow.

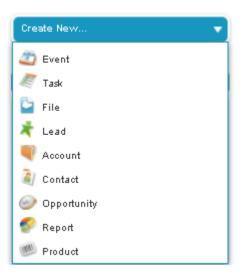
Launch the Guide

Open a case to see the newly added Handle Case button.

Case 00001016	5		1
		Customize Page Edit Layout Printable View Help f	or this P
💽 Show Chatter 😛 F	Follow		
« Back to List: Pages			- 1
Solutions (0)	Open Activities [0] Activity History [0]	Case Comments [0] Case History [3] Attachments	<u>n</u> 1
Case Detail	Edit Delete Close	Case Clone Handle Case	
Case Owner	👤 Eric Egertson [Change]	Contact Phone 314-555-1212	- 1
Case Number	00001016	Contact Email cb@gmail.com	
Contact Name	Clive Bixby		
Account Name	Acme Dynamite		
▶ Sales Guides			
▼ Additional Informa	ation		
Status	New	Type _ Feature Request	_
	man and the second	-Che P	-

Running a Guide When the User Clicks New

Salesforce users can create new objects using the Create New picklist, a button, or a link.



After users select one of these, Salesforce displays a page into which the user can enter information. If you would prefer that they run a guide, you can override these actions for standard objects. Here's how:

- Go to that object's Buttons and Links setup page; for example, App Setup Customize > Opportunities > Buttons and Links.
- 2. Within the displayed table, find the New row, and then click Edit.
- 3. Select the Visualforce page on which you are going to override the New action.
- 4. Create the Visualforce page that runs the guide. For example, if you wish to run the Create Opportunity guide, you might create a page that runs it such as:

Adding Guide Areas to Salesforce Pages

This topic describes how you add Guide Designer Wizards to a user's Salesforce Home page.

Adding a Guide Area to the Home Page

- Open the Setup menu in the upper right corner of Salesforce. From the displayed page, select App Setup
 Customize > Home > Home Page Layouts. Both of these are indicated in the following figure.
- Click Edit for to make changes to your home page. You may have more than one page. In the Edit Home
 Layout page, go to the Select Wide Components to Show area, and check the Guide Designer Wizards
 checkbox. Click Next.

Edit Home Layo	ut			Help for this Page 🥝
Step 1. Select the com	ponents to show			Step 1 of 2
Choose the components to	include on your home page layout.			
Layout Name	Dashboard Home Page D			
Select Wide Components	s to Show			= Required Information
Items to Approve		Calendar	V	
Tasks	\checkmark	Dashboard Snapshot	~	
Cloud Extend Wizards				
Select Narrow Component	nts to Show			
Create New		Recent Items	V	
Messages & Alerts	V	Custom Links	~	
Tags		Customer Portal Welcome		
				Hext

3. Place the Guide Designer Wizards component in the position where it should display on the page. When you're done, click **Save**.

After adding the Guide Designer Wizards component, an area displays for all users who see this page. On a PC or Mac, users do not see wizards whose Run on setting is set to *Smart Phone*. Similarly, smart phone users do not see wizards whose *Run on* setting is *Desktop/Tablet*.

Adding Guides to Salesforce Pages

This topic describes how you install a guides area on page; that is, this how you install a guide area on all pages except for the home page.

1. Select "your Name" > Setup on any page. From the displayed page, select App Setup > Customize > Home > Home Page Layouts. Both of these are indicated in the following figure.

salesforce	earch Leads, C	contacts, A So	earch Barry Kingsbury 🔻	Cloud Extend			
Home Getting Started Guid	e Designer	Guides 🕂	My Profile Setup				
Expand All Collapse All	Case F	Page Layou	Developer Console Logout				
Force.com Home	This page allows you to create different page layouts to display Case data. After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.						
System Overview	Case Pag	e Layouts	New Page Layout Assig	nment			
Personal Setup	Action	Page Layout Name	Created By	Modified By			
My Personal Information	Edit Del	Case Layout	Bob Demo, 7/25/2011 8:33 AM	Barry Kingsbury			
 Email Import Desktop Integration 	Case Clos	se Page Layouts	New Page Layout Assig	nment			
▶ My Chatter Settings	Action	Page Layout Name	Created By	Modified By			
App Setup	Edit Del	Case Complete Layout	<u>Barry Kingsbury,</u> 8/21/2012 1 PM	:25 <u>Barry Kingsl</u> PM			
Customize	Edit Del	M <u>Bob Demo,</u>					
▶ Home							
► Forecasts (Customizable)		man fr					
Cases							
Fields							
Contact Roles Page Layouts)						
Field Sets Search Layouts							
Assignment Rules							
		and a second sec					

2. Select Visualforce Pages. Within the area on the right, drag Section to the place where you want the guide to appear.

Close Case Layout v	<u>Mini Pac</u>	<u>e Layout Mini Console View</u> <u>V</u>	ideo Tutorial Help for this Page 🤫
Save 🔻 Quick Save Previ	ew As 🔻 Cancel 🛷 Uno	lo 🔿 Redo 🛛 📰 Layout Pro	perties
Fields Buttons Visualforce Pages Related Lists Case Sample	Q Quick Find Page Name Section Case Handle Case Case Sales Guides	e Sales Guides	
Case Detail		Standard Buttons	
	Edit Delete	Close Case Clone Sharing	
Case Information (Head		Close Case Clone Sharing	
Case Information (Head		Close Case Clone Sharing	1-415-555-1212
	er visible on edit only)		
Case Owner	er visible on edit only) Sample User	Contact Phone	1-415-555-1212
Case Owner 🔒 Case Number	er visible on edit only) Sample User GEN-2004-001234	Contact Phone	1-415-555-1212

3. Set the section's attributes by filling in the displayed dialog.

Section Properties	×
Section Name Guides	
Display Section Header On 🛛 🔽 Detail P	age
🔽 Edit Pag	je
Layout	Tab-key Order
💿 1-Column 🔘 2-Column	💿 Left-Right 🔘 Top-Down
ок	Cancel

4. Drag the guide to this newly created Guides area.

Close Case Layout -	<u>Mini Paqe</u>	≥Laγout Mini Console View ⊻	/ideo Tutorial Help for this Page 🧭
Save V Quick Save Prev	iew As 🔻 Cancel 🦃 Und	o 🐴 Redo 📔 🖪 Layout Pro	perties
Fields	Quick Find Page Name	*	
Buttons	→ Section Cas	e Sales Guides 🔪	
Visualforce Pages	* Blank Space		
Related Lists	Case Handle Case		
	Case Sales Guides	\	
Case Sample			
Case Detail	S	tandard Buttons	Custom Buttons
	Edit Delete C	lose Case Clone Sharing	
Case Information (Head	ler visible on edit only)		
Case Owner	Sample User	🚊 Contact Phone	1-415-555-1212
🔒 Case Number	GEN-2004-001234	🔒 Contact Email	sarah.sample@company.com
Contact Name	Sample Contact		_
🔒 Account Name	Sample Account		
Guides			
	Case Sales Guides 🖌		
Additional Information			
\star 🔍 Status	Sample Status	Туре	Sample Type
\star 🍳 Case Origin	Sample Case Origin	Case Reason	Sample Case Reason
Priority	Sample Priority		

5. Save your changes and you're done. This *guides area* will now appear on all Case pages.

Case Inf	formation (Head	er visible on edit only)		
	Case Owner	<u>Sample User</u>	🚊 Contact Phone	1-415-555-1212
	Case Number	GEN-2004-001234	🚊 Contact Email	sarah.sample@company.co
•	Contact Name	Sample Contact		
	Account Name	Sample Account		
Guides				
		va Case	Sales Guides	
		vr Case	Sales Guides	
		vr Case	Sales Guides	
		vr Case	Sales Guides	
		vr Case	Sales Guides	
		vr Case	Sales Guides	
		v Case	Sales Guides	
Addition	val Information	vr Case	Sales Guides	
Addition	al Information ★ ● Status	Ve Case	Sales Guides	Sample Type
Addition				Sample Type Sample Case Reason

Implementing Service Steps and Search Services

This topic describes how to create service steps and search services from Salesforce Apex classes.

Note: You can download an archive file that contains a sample automated step and a sample search service.

Creating an Apex-based Service Call Step

You can create new Service Call step services using an Apex Class that implements the IAeAutomatedStepService interface.

IAeAutomatedStepService Interface

To create the new services, you first implement two interface methods:

- describe()
- invoke()

describe()

Returns AeServiceDescription, which contains metadata for services.xml.

invoke()

Invoked at runtime.

For example:

Service Discovery with Apex Automated Steps

When you synchronize your Salesforce organization, Apex services are discovered based on their class name. If a class name starts with "icrtStep", it is recognized as a Service step (an "Apex automated step"). For example, the Apex class named "icrtStep_EchoService" is a service.

Process objects or object lists are serialized to a JSON payload format, similar to the process object input or output in other processes. They are sent to Apex where the System. JSON class in Apex can parse the JSON.

To return a process object, define the outputs as either 'reference' or 'objectlist' and serialize the objects to JSON so Process Designer converts them back to a process object.

For example, for output parameters:

```
global AeServiceDescription.AeServiceParameterDesc
    output = sDescription.addOutputParameterDesc('objOutput', 'reference');
    output.addParameterOption('referenceTo','Account');
```

Service Interface

Apex services must implement two methods:

- describe()
- invoke()

describe()

Provides information discovered for use by the cloud service.

Returns an instance of AeServiceDescription, which has the following fields:

Field	Description
serviceType	Type of service , either a service step or a search.
namespaceQualifier	Organization-specific namespace.
name	Service class name.
displayName	Name displayed to the user.
description	Text describing the service.
inputParameter (0n)	List of input parameter descriptions. (AeServiceDescription.AeParameterDesc)
outputParameter (0n)	List of output parameter descriptions. (AeServiceDescription.AeParameterDesc)

invoke()

Implements the runtime behavior of the service.

Parameter	Description
objectId	ID of the Applies To object from the host's context.
objectType	Type of the Applies To object from the host's context.
parameter (0n)	List of AeServiceParameter name/value pairs.

Takes an instance of AeServiceRequest as input.

Returns AeServiceResponse, which has the following fields:

Field	Description
parameter (0n)	List of AeServiceParameter name/value pairs.
errorInfo.AeErrorInfo	Conveys error information. Use this to relay error information instead of throwing an uncaught fault within your service
errorInfo.errorMessage	Error message.
errorInfo.invalidData	Field-level error details.

Custom Search Services

You can implement search services as Apex classes. Search services use the same interface and discovery mechanisms as step services, with the following differences:

- Set the service type to search in AeServiceDescription: AeServiceDescription.serviceType = 'search';
- There should be one output parameter, Search Results, that returns the data.
- To return a valuelist, the invoke() method should return name/value pairs representing the name/id of the
 objects returned.

The following example returns a valuelist of account references filtered by Ownerld:

```
List<Account> accountList =
  [SELECT Name, id FROM Account WHERE OwnerId =:userRef LIMIT 20];
  for (Account account: accountList)
   {
     // For a search service, return name/id as parameters
     response.addParameter(account.Name, account.Id);
}
```

Republish the Salesforce Connection

To make custom automated step and search services visible, you need to republish the Salesforce connection from Application Integration.

Note: You need to republish the Salesforce connection only when you make a change to the class interface, not when you make a change to the class.

CHAPTER 5

Mobile Guides

This chapter includes the following topics:

- Mobile Guides Overview, 58
- Smart Phone Setup, 59
- Contacts on Your Cell Phone, 59
- Smart Phone Calendar Entry, 61

Mobile Guides Overview

The procedures you use when you create guides that run on smart phones are identical to those you use when you create guides that run on a PC or a Mac.

However, the smaller screen affects your design in the following ways:

- Mobile forms typically have just a few fields, with more steps, due to the limited display area.
- The order of fields in a mobile guide is critical because of the limited number of visible items at any one time.
- Use of images is more limited due to size constraints.
- Guides are often launched from URLs that are provided to or are created by your users.
- Keep in mind that users will use the phone's voice processing software.
- Typing is less convenient on a mobile device. Where possible, let the user choose data from lists or checkboxes.
- You can design a guide with the Run On setting as Desktop/Tablet and change the setting to Smart Phone when the design is complete.
- If you need a guide to run on both a mobile phone and on a larger device, you can do much of the work in embedded steps, to make it easier for use on both device types.
- Guide Designer requires that all guides, even embedded guides, have a Run on setting. However, at
 runtime, it uses the Run on value set for the embedding task and ignores the Run on setting in the
 embedded guide..
- Depending on the type of phone and operating system, users may have limited abilities to format text.

You can run a guide in your Android phone or iPhone, using the phone's browser.

Note: Guides display and run only on the device type selected for the guide (Smart Phone or Desktop/Tablet).

Smart Phone Setup

This topic explains how guide users can install an icon that launches a guide in the phone's browser.

Using Wizards on an iPhone

On an iPhone, users must:

- 1. Enable cookies for Guide Designer. If they are not set, go to iPhone Settings and set **Safari > Accept Cookies** to **Always**.
- 2. Open Safari and login to Salesforce. In most cases, just go to http://login.salesforce.com/.
- 3. After logging in, select the *Home* tab if it isn't already selected. Although it may be small, you will see the Guide Designer Wizards area.
- 4. Tap the **New Window** button in the Guide Designer Wizards area. A list of guides appears in its own window, making it much easier to read.
- 5. Tap the iPhone icon that lets you bookmark the page or add it to the Home Screen.

Using Wizards on an Android Phone

On an Android phone, users must:

- 1. Open their browser and login to Salesforce. In most cases, just go to http://login.salesforce.com/END.
- 2. After logging in, select the *Home* tab if it isn't already selected. Although it may be small, you will see the Guide Designer Wizards area.
- 3. Tap the **New Window** button in the Guide Designer Wizards area. A list of guides appears in its own window, making it much easier to read.
- 4. Touch the star at the right of the URL bar, perhaps edit the page's name, tap **Bookmarks** or a folder in the **Add To** menu, and then tap **OK**.

For more information, see documentation at the Google support site.

Contacts on Your Cell Phone

The mobile phone setup wizard adds a vCard button to your Contact pages.



Pressing this button tells Salesforce to create a **vCard** file (it has a .vcf extension), and sent it to your browser. For most browsers, click on the file's name to add a contact to your personal contacts.

- Firefox: The name is in its Download dialog.
- Chrome: The name is at the bottom within the window's frame.
- Internet Explorer: You can run it from the displayed dialog box.

After it loads, you can see it in your contact manager. Here, for example, is the contact within Microsoft Outlook. Notice the Web page address link:

💵 🛛 🖓 🍽 🔶 🧇 🖃 🖛 Howard Jones - Contact								
File Contact Insert Format Text Review								
Save & Ne Save & Delete Close		E-mail Meeting More * Communicate						
Full Name H	oward Jones							
Company: G	ilobal Media							
Job title: B	uyer	Guide Web						
File as: Jo	es, Howard 🗸 page							
Internet		address						
🔛 E-mail 💌 <u>m</u> i	ichael.rowley@activevos.com							
Display as: H	Howard Jones (michael.rowley@activevos.com)							
Web page address: h	https://ce4sf20-001.na12.visual.force.com/apex/AeGuideList?ot							
IM address:								
Phone numbers								
Business 🔹 [2	12) 555-5555	and the second						

This link also appears in this contact on your smart phone after it syncs with your contact manager, which is the left phone in the next figure. Clicking on the link opens your phone's browser and it displays the guides that you can use for this contact. You can now click on a guide's link to open the guide's first step. If there is only one guide, this guide displays.

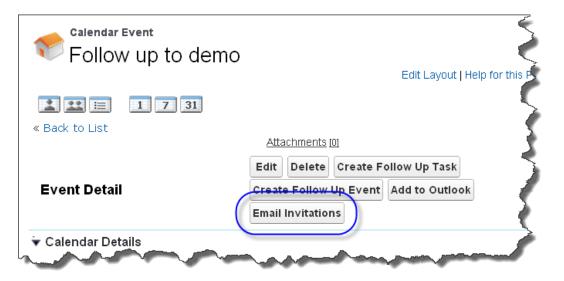


Note: Only mobile guides are displayed when you use this link. Guides that were designed for display in your PC's browser are not shown. Similarly, clicking on this link while using a contact manager such as Outlook when you are using a PC or a Mac tells Guide Designer that it should only display non-mobile guides.

Smart Phone Calendar Entry

When smart phone support was added to Guide Designer, the setup wizard added an **Email Invitations** button to Salesforce Calendar Event pages.

Note: This button only appears on the page that Salesforce displays when it shows you information about already created events. It does not appear on the page containing the form that you use to create the event.



After you select this button, the wizard displays a wizard that creates iCal files. After the completing the wizard, Guide Designer sends mail to the people you've identified. For many, it will attach an iCal file. It actually sends two different iCal files. The first places the event on a calendar after it is executes. It also has a link to the guide that the event's host will use. The second sends iCal files to the people attending the event and who are identified in your Salesforce objects. This iCal file just places the event on a calendar. It also has any text that you added. If the person is not identified in your Salesforce objects, the wizard just sends the text you entered.

Instructions
A calendar invitation will be sent to Barry Kingsbury (the event owner), which includes a link to a wizard to run after the meeting.
Do you also want to send an invitation to Barry Kingsbury? ○ No ⊙ Yes
Do you also want to send an invitation to the other invited participants for this event (including a link to the event page in Salesforce)? ● No ● Yes
Provide email addresses for any additional recipients of the invitation, separated by semicolons:
barryk@onbsotonharbor.com
Subject: Follow up to demo
Body:
B ℤ Ü Ξ Ξ 潭 潭 ∞ 炎 墬 ") (* 国 マ
To go over what you think about the product and find out if you're having any problems
a provide a present of the second
Email Invitation For Event
Continue

After making choices in this step and perhaps adding additional recipients, click the **Continue** button to send invitations. The wizard attaches an iCalendar ics file to the email. When the recipient clicks on it within the received email, the event is added to the recipient's calendar. The event owner receives a slightly different email as it also has a link to the guide navigator. Here is a Microsoft Outlook example containing the link:

🔲 🖬 🤊 🛛	ŭ 🍲 👻 ⊽ Follow up to demo - Appointment 🖂 I								23				
File	Appointment Insert Format Text Review						۵	0					
Save & Delet	 □ te → 		oppointment	,	Invite Attendees	Options	₹ Tags	Zoom					
Action	IS		Show		Attendees			Zoom					
Subject:	Follow	up to c	lemo										
Location:	Web Co	nferen	ce										-
Start time:	e: Fri 6/29/2012 • 10:00 AM • All day event												
End time:	Fri 6/29/	2012		• 10:	30 AM	.							
View Guide: < <u>https://c.na12.visual.force.com/a`pex/AeGuideList?</u> <u>objectId=00UU0000002qAcNMAU&objectType=Event</u> >. To go over what you think about the product and find out if you're having any problems													
~~~~~	·····		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		~~~		~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~	~	$\smile$	-	

On an iPhone, you will receive the Event data shown in the left screen in the next figure. After tapping this link, the wizard sends the first step to your phone, which is shown in the right screen.



### Importing iCal files on Android Phones

Android phones, by default, do not support iCal ics files. Instead, Android relies on apps that you can download into your app using Google Play. Informatica does not validate or test any of these apps. Our advice with regard to choosing an app is to choose one with many downloads. Also, it is possible that some apps do not work with the Android version that you are using.

In testing apps, attachments within gmail were usually opened without needing support from another app.

In most cases, the app works by recognizing the ics file type used by iCal files. When you click on an iCal email attachment from another app, you are usually asked if you want to download or preview the attachment. One of the options should be the name of the app you installed that is associated with iCal files. You should also see a checkbox that lets you set this app as the default action. If you have more than one calendar app on your phone, you will need to choose which calendar the iCal app will use. Finally, some apps import the iCal file and leave the calendar entry in an open state so that you can view and modify it. It is not saved unless you explicitly save it. Other apps just save it and you will have to open it separately. Others save it and leave it open.

### CHAPTER 6

# Meeting Follow-up Wizards

This chapter includes the following topics:

- Meeting Follow-up Wizards Overview, 66
- After Meeting Wizard, 68
- Running a Wizard from the Contact Page, 71

### Meeting Follow-up Wizards Overview

The meeting follow-up wizards, built with Guide Designer for Salesforce, accelerate and automate many routine tasks that are performed after meetings. These include recording notes, creating contacts, and assigning follow-on tasks. The Guide Designer wizards add additional integration between Salesforce and your smart phone.



After the wizards are installed within your Salesforce pages, you are ready to run them. Two of the wizards run from within your mobile phone. The third runs from a Salesforce page.

### Running Wizards on your Smart Phone

Two of the follow-up wizard discussions present guides that run on mobile phone. A Guide Designer Wizard is not an app; that is, you do not have to download something from iTunes or Google Play. Instead, the wizards are web applications that run in your smart phone's browser.

As you will see, running a wizard on your smart phone lets you add information about a contact, opportunity, lead, or any other of your Salesforce objects much closer to the time when you met with or talked to someone. You do not have to start your laptop and perhaps find a Wi-Fi hotspot. Instead, you can interact with Salesforce using a wizard that helps you enter information and does it in a way that fits into the small size of your smart phone's screen.

When wizards are defined, they are defined in a way that makes each step (that is, each screen) appear in a way best suited for your phone. If your site has created wizards, you can go display just your wizards. These wizards usually let you create new objects. For example, a guide could help you create a new lead.

When you login into Salesforce, it displays your Salesforce home page. If you scroll down, you will see a Guide Designer Wizards section. This section contains the wizards that you can execute from your home page. Directly underneath the list of Wizards, you will find a New Window button. Tapping on this button displays the wizards on their own page. You may want save that page as an icon on your phone's home screen.

### **Contact Wizards**

After talking with a contact, you can update Salesforce in two ways. If you are using Salesforce on a PC or Mac, use the Sales Call Follow-up wizard to enter new tasks, notes, contacts, and opportunities. You can also

set follow-up tasks for yourself and others. To run this wizard, go to the contact's page in Salesforce and select this guide from the Guides section. (The Guides section was added to your contact pages when your administrator installed the wizards.) For more information, see <u>"Running a Wizard from the Contact Page" on page 71</u>. If you are using a smart phone, you can use the "After Meeting Wizard" on page 68.

The Mobile Phone Setup Wizard added a **vCard** button to your Salesforce contact pages. After pressing this button, the Guide Designer wizard creates a **vCard** file that your browser can download. Opening this file adds a contact to your contact manager (for example, Microsoft Outlook). It will also add a link that, when clicked, displays the guides that you can use for this contact. For more information, see <u>"Contacts on Your Cell</u> Phone" on page 59.

### **Smart Phone Calendar Entry**

The Mobile Phone Setup Wizard add an **Email Invitations** button to your Salesforce Calendar Event pages. After pressing this button, a wizard displays a page for customizing an invitation and perhaps sending it to more people. The invitation contains an iCalendar file, which when the recipient clicks on it, adds the event to the recipient's calendar.

For more information, see "Smart Phone Calendar Entry" on page 61.

### After Meeting Wizard

The After Meeting Wizard lets you accelerate and automate many of the routine tasks that are performed after meetings. It lets you update existing opportunity information and add new ones after talking to a contact. It also lets you add new contacts, notes, and create follow-up tasks.

Select a heading to see the different operations that the Wizard guides you through.

#### **Identify Contact and Update Opportunities**

Step 1

If the guide did not start with a known contact, who did you contact?



#### Step 2

If the meeting was associated with an opportunity, then update the stage, amount, close date and next step for the opportunity. Also add meeting notes which will be added to the activity history for this opportunity.

**Note**: When entering text such as notes, it is far easier to use your smart phone's voice recording capabilities if it has them.

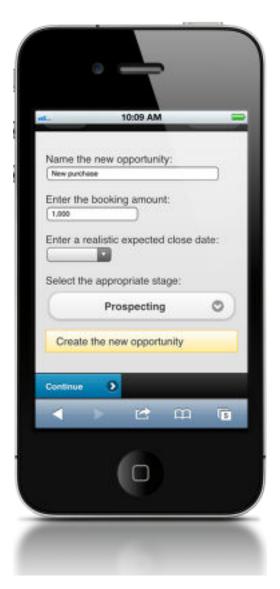
#### Step 3

Provide (or update) the role that this contact plays in this opportunity (e.g., business user or decision maker).

#### **Additional or New Opportunities**

#### Step 4

The wizard then presents a list of all other opportunities for this account. Select any that were discussed in this meeting. The wizard then walks through each selected opportunity and allows you to update them.



#### Step 5

Add any new opportunities that were discussed, providing key fields for each.

#### **New Contacts**

#### Step 6

Create contacts for any people from the meeting that were not already contacts.

#### Follow-Up Tasks

#### Step 7

Create a follow-up task for yourself.



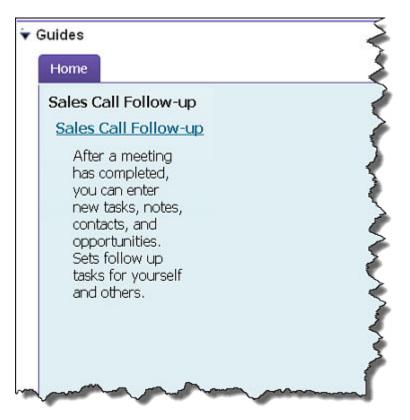
#### Step 8

Create follow-up tasks for other people.

Done!

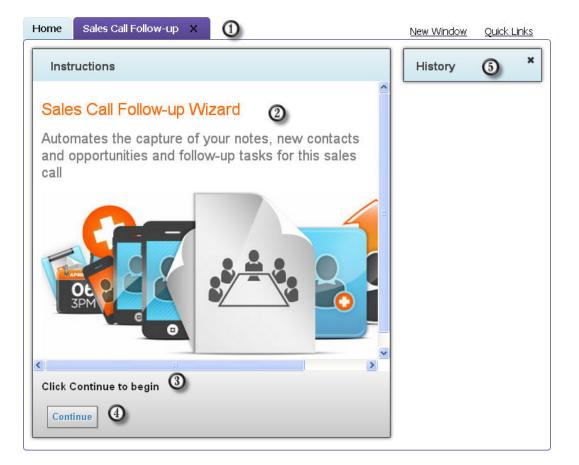
### Running a Wizard from the Contact Page

After your administrator installs the meeting wizards, all of your contacts will have a **Guides** area. This area contains the "Sales Call Follow-up Wizard." This wizard only displays when you are using a PC or a Mac.



Click on the "Sales Call Follow-up" link to start the wizard. The first step within the wizard displays. (All screens within the wizard are called "steps".) The table following this figure explains what is within this first step.

The way information is presented from step-to-step may differ slightly; however, all are similar.



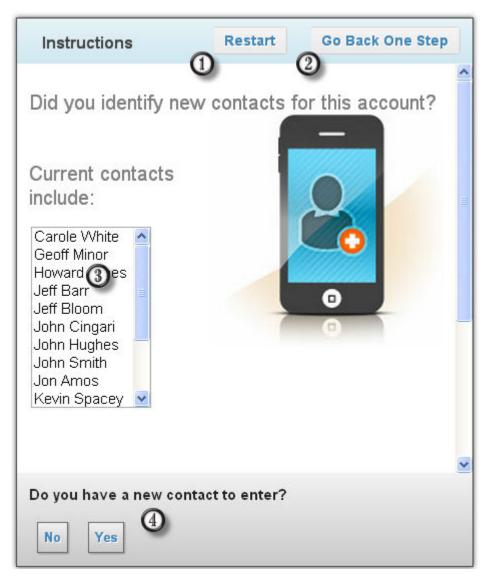
1	A tab for your wizard and others wizards that you are using.
0	The step's main area. This area can contain instructions, information, areas into which you will be able to type text, select check boxes, and so on. The step shown here only has text as it describes what the wizard does.
3	A prompt area. This text tells you which button to press so to select the step that the wizard next executes. This step has only one button.
4	Pressing a button in this area tells the wizard what the next step will be. In many cases, a step has more buttons than are shown here. Each button tells the wizard what the next step will be. For example, a step that asks a question might have Yes and No buttons, and the step that follows depends upon which you select.
6	The history of the steps you've executed. A new item is added after you press a button within the prompt area. Each step in the history is actually a link. Clicking on it reverts the wizard back to a previously executed step. This also undoes any of the changes made to Salesforce since the step you're going back to executed. This could, for example, delete a lead that another step created.
	Note that you can close the history window to make more room for the main wizard window by clicking on the "x".

In this example, press the Continue button after you've read the step's text. The wizard now displays the following step.

lome	Sales Call Follow-up X			New Window Quick Links
Instr	ructions ①	Restart Go	Back One Ste	ep History ×
	h of the existing oppo ou talk about? ②	ortunities of Glo	obal Media	Kep Answer     Click Continue     Continue     Continue
0	Name	Amount	Close Date	
G	ilobal Media - Cloud Extend f	Purchase 9500.0	11/16/2012	
C C	ompany-new sale	10000.0	05/03/2012	
G	ilobal Media - quickstart cons	sulting 999.0	05/16/2012	
Update Cont	e existing opportunities inue			

1	The "Instructions" label is in all steps.
0	A question. Most steps begin with a question or instructions. A form into which you'll enter information usually follows.
3	Here, the wizard displays all of the opportunities with this company. The wizard uses the contact's company name to locate and display this Opportunity information.

After advancing a few steps, the wizard can display:



This figure contains two new elements added to the step. Also, two others are slightly different.

1	The Restart button tells the wizard to return to its first step. Unlike using the history to go back to the first step, clicking restarts will not undo any of the changes made by the wizard (such as deleting objects).
2	While you can return the wizard to any of its previously executed steps by clicking on the step in the History list, it is often more convenient to press the Go Back One Step button if all you want to do is return back to the step just executed.
3	This table, automatically generated by Guide Designer, contains a list of your contacts for this account.
4	Unlike the two previous steps shown in this topic, this step contains two buttons. Other steps can contain more (or perhaps many more).

## CHAPTER 7

# **Controlling Who Sees Guides**

This chapter includes the following topics:

- Controlling Who Sees Guides Overview, 76
- Filtering Using Tags, 77
- Enabling Guide Designer-Related Classes for New Profiles, 78
- Associating Guide Designer Apex Classes With a User Profile, 83
- Show Guide Only When, 87
- Creating an Object that isn't Available by Default, 88

#### **Controlling Who Sees Guides Overview**

Two ways exist for you to control which of your users can see guide navigator areas on Salesforce pages. The most common is to uses page layouts that are assigned to user profiles. If you need more granularity than this method provides, you can use permission sets. A permission set allows you to assign an object to a set, then assign that permission to selected users. (For more information on permission sets, see Permission Set Overview in the Salesforce documentation.)

Using permission sets, all users in a profile will still see a page layout that has a section for guides. However, only users associated with the "Guide User" permission set will actually see the guide navigator. Other users that open the "Guides" section of their page will see a message something like:

```
Content cannot be displayed: You do not have sufficient privileges to access the page: /apex/ce4sf20_001__AeCaseSalesGuides"
```

Using permission sets is a three-step process.

- Go to the Visualforce page for guides and change their security setting so not users are allowed. Do this
  here because Visualforce pages for guides are typically named "objectName Sales Guides". Now, no one
  is able to see the guide navigator.
- Create a permission set called "Guide User". In this permission set, click on "Visualforce Page Access" and give access to all of the CE Visualforce pages.
- 3. Go to the users that should have access to Guide Designer and associate them with that permission set.

Now, only these users will see the guide navigator.

## Filtering Using Tags

3.

When you define a guide's properties, you specify the object to which the guide applies and all users who have access to the object can see the related guides.

You can set conditions under which guides appear by Using the **Tags** area on the **Guide Properties** dialog. For example, if you might want to display a certain guide only for leads with an "Open - Not Contacted" status. In this case, you first create a tag for the guide that is used as a display filter. In addition to the built-in capability filters for some object fields, you can then customize guides to apply these tags.

**Note:** You can also simply set Guide Properties to determine where guides display. For details, see <u>"Show</u> Guide Only When" on page 87.

To filter from the Visualforce page, use this approach:

- 1. From the Salesforce Setup menu, select App Setup > Develop > Pages.
- 2. Select the Visualforce Markup tab:

Salesforce1 Setup	Page Detail			Where is this used? Preview
Force.com Home		Label	Opportunity Sales Guides	
		Namespace Prefix	icrt	
System Overview	Require C SRF	protection on GET requests		
Personal Setup		Last Modified By	Chris Keller, 6/30/2015 1:18 PM	
My Personal Information				
Email	Package Information			
Import		Installed Package	Informatica Cloud Real Time for	Salesforce
<ul> <li>Desktop Integration</li> <li>My Chatter Settings</li> </ul>	(m. m. m. )	N		
My Connected Data	Visualforce Markup	Version Settings		
Work.com	<pre> <apex:page_stand< pre=""></apex:page_stand<></pre>	ardController="Opportu	nitv">	
			unity" objectId="{!Opportun	ity.Id}" extraInfo="{!JSENCOD
App Setup			match="Role={!JSENCODE(SU	<pre>BSTITUTE(\$UserRole.Name, ",",</pre>
Customize				
Create				
				Where is this used? Preview
Develop				
Develop Apex Classes				
Develop Apex Classes Apex Triggers				
Develop Apex Classes Apex Triggers Apex Test Execution API Components				
Develop Apex Classes Apex Triggers Apex Test Execution API Components Custom Permissions				
Develop     Apex Classes     Apex Triggers     Apex Test Execution     API     Components				

4. Add a filter to this page to create a tag, using the guidelines below. For example, a guide could filter by account types, account industries, or user roles.

#### Guidelines

Suppose you want users with different roles to see and be able run different sets of guides for Opportunities. To do so, simply create a tag like Role=CEO on your guide. Since the Opportunity object type is already set up to filter based on role, this guide will now only appear if the user's role is CEO.

The equals sign (=) determines how the guide use the tag's contents for matching. The guide will be displayed only if the object matches all of the guide's tags.

Notice this condition in the Visualforce page definition:

```
match="Role={!JSENCODE(SUBSTITUTE($UserRole.Name, ",", ""))}
```

When the Opportunity page loads, because *QUserRole.Name* is a match (in this case, match="Role=CEO", the guide displays. (You can ignore the JSENCODE and SUBSTITUTE functions.)

If a guide does not have a tag with an equal sign, it is always shown, you can define match criteria to excludes a specific value, or hide a guide by setting a match definition will never occur, for example, Role=foo.

In the Account page definition (AeAccountSalesGuide), there are three possible matches. Using the same kind of logic, you could create a guide that matches on any of the fields that are on the page:

```
<apex:page standardController="Account">
        <c:AeSalesGuides objectType="Account" bjectId="{!Account.Id}"
        extraInfo="{!JSENCODE(Account.Name)}"
        match="Role={!JSENCODE(SUBSTITUTE($UserRole.Name, ",", ""))},
        Type={!JSENCODE(SUBSTITUTE(Account.Type, ",", ""))},
        Industry={!JSENCODE(SUBSTITUTE(Account.Industry, ",", ""))}"/>
        </apex:page>
```

# Enabling Guide Designer-Related Classes for New Profiles

This topic presents a set of operations that let you enable Guide Designer-related classes for new profiles within Salesforce and then enable the Guide Designer Apex-related classes and the Visual Force pages for the profile.

As an example, this topic shows how you launch a guide with Chatter Only License.

1. From the list of User Profiles (located within **Setup > Administration Setup > Manage Users > Profile**), click the link of the Chatter Only User. (Do not select Edit.)

Q Quick Find		Profiles				
Force.com Home	Below is a	Below is a list of the profiles for your organization. You can view				
System Overview	Profile					
System Overview	Action	Name				
Personal Setup	Edit   Del	<u>3333</u>				
My Personal Information	Edit	Chatter External User				
Email	Edit   Del	Chatter External User Cloned				
<ul> <li>Import</li> </ul>	Edit	Chatter Free User				
Desktop Integration	Edit	Chatter Moderator User				
My Chatter Settings	Edit   Del	Chatter Only Cloned				
	Edit	Chatter Only User				
App Setup	Edit	Content Only User				
Customize	Edit	Contract Manager				
Create     Develop	Edit	Customer Portal Manager				
Develop     Deploy	Edit	Customer Portal Manager Custom				
Schema Builder	Edit	Customer Portal Manager Standard				
Canvas App Previewer	Edit	Customer Portal User				
Installed Packages	Edit	Force.com - One App User				
AppExchange Marketplace Critical Updates	Edit	Gold Partner User				
Chircal Opulaes	Edit	High Volume Customer Portal User				
Administration Setup	Edit	Knowledge Only User				
Manage Users	Edit	Marketing User				
Users		My Portal User				
Mass Email Users		Read Only				
Roles	Edit					
Permission Sets	Edit	Siteforce Only User				
Profiles	Edit	Solution Manager				
Public Groups	Edit	Standard Platform User				

2. Click the **Clone** button, specify a profile name, and then click **Save**.

Profile Chatter Only User « Back to List: Users		4
Users with this profile have the permissions	and page layouts listed below	v. Administrators can change a user's profile by editing that user
If your organization uses Record Types, use	the Edit links in the Record 1	Type Settings section below to make one or more record types a
		Login IP Ranges (0)   Enabled Apex Class Access (12)   Enabled
Profile Detail		Edit Clone View Users
Name	Chatter Only User	
User License	Chatter Only	
Created By	Bob Test, 8/17/2012 7:18 AM	8

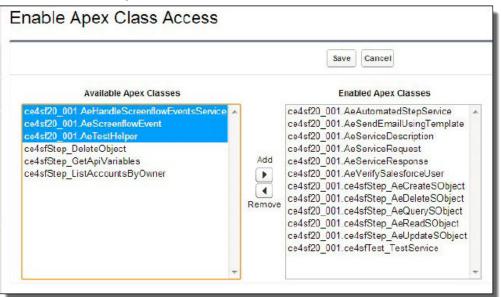
3. Click the link for **Enabled Apex Class Access**, click **Edit** and select all classes starting with "ce4sf20_001 from the Available Apex Classes and add them to Enabled Apex Class. Click **Save**.

Back to List: Users			
Jsers with this profile have the permissions	and page layouts listed l	below. Administrators can change a user's profile by e	diting that user's personal information.
your organization uses Record Types, use	the Edit links in the Rec	ord Type Settings section below to make one or more Looin IP Ranges (0) Enabled Apex Class Acces	
Profile Detail		Edit Cione Delete View Users	
Name	TestChatterProfile		
User License	Chatter Only		Custom Profile
Description			
Created By	Uma Ashok, 8/29/2013	12:05 PM	Modified By
Console Settings			
Console Layout	[Edit]		
Page Layouts			

4. Click the link for Enabled Visual force Page Access, click Edit.

		Save	Cancel
Available Apex Classes		Enat	oled Apex Classes
ce4sf20_001 AeHandleScreenflowEventsService ce4sf20_001.AeScreenflowEvent ce4sf20_001.AoTostHelpor ce4sfStep_DeleteObject ce4sfStep_GetApiVariables ce4sfStep_ListAccountsByOwner	Add ce Remove ce ce ce ce ce ce ce ce ce ce	4sf20_001.Ae3 4sf20_001.Ae3 4sf20_001.Ae3 4sf20_001.Ae3 4sf20_001.Ae3 4sf20_001.ce4 4sf20_001.ce4 4sf20_001.ce4 4sf20_001.ce4	AutomatedStepService SendEmailUsingTemplate ServiceDescription ServiceResponse VerifySalesforceUser IsfStep_AeCreateSObject IsfStep_AeDeleteSObject IsfStep_AeQuerySObject IsfStep_AeQuerySObject IsfStep_AeUpdateSObject IsfStep_AeUpdateSObject

5. Select all pages starting with "ce4sf20_001" from the Available Visual force Pages and add them to Enabled Visual force Pages and click **Save**.



6. Edit the profile, navigate to Custom Object Permissions, and set the Access rights for the custom objects for Read, Create, Edit, Delete as appropriate. Refer to the following snapshot below for an example. Your choices will be what is required for your organization. Click the **Save** button located at the bottom of the page.

	Basic Acce	<b>855</b>			Data Administ	tration
	Read	Create	Edit	Delete	View All	Modify All i
account999						
Ad Groups						
Google Campaigns						
Guides						
Guide Executions						[[[]]
Guide Milestones			V			1
Invoice Statements						
Keywords						(FT)

7. Go to App Setup > Customize > Home Page Layouts, click Page Layout Assignment and select a Home Page Layout for the newly created cloned Chatter User Profile. Below is an example.

Customer Portal Manager Standard	Home Page Default	
Customer Portal User	Home Page Default	-
Force.com - One App User	Home Page Default	•
Gold Partner User	Home Page Default	
Guest License User	Home Page Default	-
High Volume Customer Portal User	Home Page Default	-
Knowledge Only User	Home Page Default	•
Marketing User	Dashboard Home Page Default	
My Portal User	Home Page Default	
Read Only	Dashboard Home Page Default	
Siteforce Only User	Home Page Default	-
Solution Manager	Dashboard Home Page Default	-
Standard Platform User	Home Page Default	-
Standard User	Dashboard Home Page Default	
System Administrator	Dashboard Home Page Default	-
TestChatterProfile	Dashboard Home Page Default	•

8. Edit the Home Page Layout selected in the previous step and make sure that the Guide Designer Wizards checkbox is selected, click **Next**, then **Save**.

choose the components to include on your	home page layout.	
Layout Name	Dashboard Home Page D	
Select Wide Components to Show		
Items to Approve	Calendar	1
Tasks	Dashboard Snapshot	1
Cloud Extend Wizards	CustomGuide	
Projetech		
Select Narrow Components to Show		
Portal Sidebar Search	Create New	1
Portal Document Search	Recent Items	1
Portal Solution Search	Messages & Alerts	1
Portal Product Search	Custom Links	1
Tags	Customer Portal Welcome	E

#### More Information

Chatter only licenses are also known as Chatter Plus. They are designed for Unlimited, Enterprise, and Professional Edition users that do not have Salesforce licenses but need access to some Salesforce objects

in addition to Chatter. These users can access standard Chatter people, profiles, groups, and files, plus they can:

- View Salesforce accounts and contacts.
- Use Salesforce CRM Content, Ideas, and Answers.
- Modify up to ten custom objects.

# Associating Guide Designer Apex Classes With a User Profile

This topic shows how to create a profile and associate Guide Designer-related Apex classes to it. The procedure that you will read allows guides to run with Salesforce Chatter Only licenses.

1. Select Setup > Administration Setup > Manage Users > Profile.

salesforce							
Home Campaigns Leads	Accounts	Contac	s Opportunities	Forecasts	Contracts	Cases	Solut
Expand All   Colla	U		rofiles st of the profiles for yo	ur organization	. You can view	more detaile	ed inform
Force.com Home	P	Profile			New		$\neg$
System Overview		Action	Name				U
Personal Setup  My Personal Information  Email  Imp		Edit Edit	Authenticated Website Chatter External User				A o
		Edit	Chatter Free User				C
		Edit	Chatter Moderator User			h	- ad
m mm	-	، سر ر	- marine r	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~	<u> </u>
Administration Setup	<u></u>	Edit	Marketing User	$\sim$ $\sim$		_	s
Manage Users	1	Edit	Partner App Subscription	1			Pa
Users		Edit	Partner User				
Mass Email Users		Edit	Read Only				5
Roles		Edit	Service Cloud				े
Permission Sets		Edit	<u>Silver Partner User</u>				्रे
Profiles		Edit	Solution Manager				Se
Public Groups		Edit	Standard Platform User				
Queues Login History		Edit	Standard User		المرسع معادمات		s

2. Select a User Profile. Here "Chatter Only User" will be selected.

Profile	
Action	Name
Edit   Del	<u>aaaa</u>
Edit	Chatter External User
Edit   Del	Chatter External User Cloned
Edit	Chatter Free User
Edit	Chatter Moderator User
Edit   Del	Chatter Only Cloned
Edit 🤇	Chatter Only User
Edit	Content Only User
Edit	Contract Manager
Edit	Customer Portal Manager
Edit	Customer Portal Manager Custom

3. On the displayed page, click the **Clone** button.

Chatter Only Us	ser		
Users with this profile ha	ve the permis	sions and page layou	ts listed below. Administrators can change a user a
If your organization uses	Record Type:	s, use the Edit links in t	the Record Type Settings section below to make on
			Login IP Ranges
Profile Detail			Edit Clone Delete View Users
	Name	Chatter Only User	<u>لم</u>
U 	ser License	Chatter Free	mmmmmm

4. On the displayed page, give the profile a name; for example, "TestChatterProfile" and then click **Save**.

Clone Profile	
Enter the name of the new profile.	3
You must select an existing profile	to clone from.
Existing Profile	Chatter Only User
User License Profile Name	Force.com - App Subscription TestChatterProfile
	Save Cancel

5. Salesforce displays a Profile page for the profile you just created. On that page, press **Enabled Apex Class Access**.

Profile Chatter Only User	
Users with this profile have the permissions and page lay	routs listed below. Administrators can change a user's profile by editing that user's personal
If your organization uses Record Types, use the Edit links	in the Record Type Settings section below to make one or more record types available to us
	Login IP Ranges [0]   Enabled Apex Class Access [0]   Enabled Visualforce Page Access [0]
Profile Detail	Edit Clone Delete View Users
Land and the second sec	have a second second second second

Salesforce scrolls this page and displays this area. The area may already have some classes enabled or, as in this example, none are yet enabled.

Login Hours	Edit
No login hours specified	\$
Login IP Ranges	New
No login IP ranges specified. Users from any IP address are allowed to	b log in.
Enabled Apex Class Access	Edit
No Apex Classes enabled	
Enabled Visualforce Page Access	Edit
No Visualforce Pages enabled	· ······

Click the Edit button.

 Within the Available Apex Classes area on the left, select all of the classes starting with "ce4sf20_001" and press the Add button. This name may be different in some releases. However, they will always begin with "ce4sf". 7.

	Save Cancel
Available Apex Classes	Enabled Apex Classes
ce4sf20_001.AeHandleScreenflowEventsService ce4sf20_001.AeScreenflowEvent co4sf20_001.AoTostHolper	ce4sf20_001.AeAutomatedStepService ce4sf20_001.AeSendEmailUsingTemplate ce4sf20_001.AeServiceDescription
ce4sfStep_DeleteObject ce4sfStep_GetApiVariables ce4sfStep_ListAccountsByOwner	Add Add Ce4sf20_001.AeServiceResponse ce4sf20_001.AeServiceResponse ce4sf20_001.AeVarifySalesforceUser ce4sf20_001.ce4sfStep_AeCreateSObject ce4sf20_001.ce4sfStep_AeDeleteSObject ce4sf20_001.ce4sfStep_AeQuorySObject ce4sf20_001.ce4sfStep_AeReadSObject

8. Scroll the profile window up until you see the Custom Object Permissions area. Set the access rights for the custom objects for Read, Create, Edit, or Delete as appropriate. Here is an example:

	Basic Acce	<b>85</b>			Data Administ	tration
	Read	Create	Edit	Delete	View All	Modify A
account999						<b></b>
Ad Groups			V	V		<b>1</b>
Google Campaigns						[77]
Guides			V	V		
Guide Executions						
Guide Milestones				V		
Invoice Statements						[FT]
Keywords						[FT]

- 9. Click the **Save** button located at the bottom of the page.
- 10. Go to App Setup > Customize > Home > Home Page Layouts, and click the Page Layout Assignment

•	Home Page Layouts						
	This page allows you to create different tab layouts for the Home Tab.						
	A   B   C   D   E   F   G   H   I   J   K   L   M   N   O   P   Q   R   S						
			Page Layout Assignm	nent			
	Action	Name 🕈	Created By	Last Modified By			
	Edit   Del	DE Default	Barry Kingsbury, 6/10/2013 9:54 AM	<u>Barry Kingsbury,</u>			

- 12. Select a home page layout for the newly created profile; in this example, it is "TestChatterProfile." Click **Save**.
- 13. Edit the home page layout selected in the previous step and make sure that the "Guide Designer Wizards" checkbox is selected. Click **Next**, then click **Save**.

Edit Home Lay	out	
Step 1. Select the comp	onents to show	2
Choose the components	to include on your home page layou	t 👌
Layout Name	DE Default	ş
Select Wide Componen	ts to Show	l l
Items to Approve		}
Tasks		Dashboard
Cloud Extend Wizards		

### Show Guide Only When

Note: This feature only applies to guides that execute within Salesforce.

You can determine which guides display within the "Guides" area on a user's Salesforce page by entering criteria in the guide properties. Enter the criteria in the **Show Guide Only When** field on the Guide Properties **Advanced** tab.

The criteria must be entered as a Boolean expression. You can use the functions and operators described in the Salesforce documentation. See the examples below.

Use the Insert Field list to select insert objects and fields into the expression.

This expression can be as complex as you need. For example, here is an expression that tells Guide Designer that it should only display a guide when an account's owner is one of three people:

```
CONTAINS($Account.Owner.Name, "John Smith")
|| CONTAINS($Account.Owner.Name, "Bob Smith")
|| CONTAINS($Account.Owner.Name, "Jim Smith")
```

**Note:** Do not use Salesforce field syntax (enclosing field names in curly braces with the "!" prefix) when you enter field names. The expression is passed directly to Salesforce as an Apex expression. If you pass an invalid Apex expression, Salesforce returns an error message.

#### Example 1

If the field is a list, you can use an equals sign to select one of the items from the list. For example:

Account.Type = 'Analyst'

#### Example 2

To define multiple criteria, use "&&" (logical AND) and "||" (logical OR) in your expression. For example:

```
(Account.Type = 'Analyst' && Account.testfield_c= true) || (Account.Phone = '1234')
```

In this case, the expression means that:

- 1. The account type must be Analyst AND the testfield must be true, OR
- 2. The account phone number must be 1234.

In this case, the parentheses group the first two tests so they are evaluated as a single unit.

In the following example, the parentheses cause this expression to be evaluated differently:

```
(Account.Type = 'Analyst') && (Account.testfield_c= true || Account.Phone ='1234')
```

Here, the same criteria means that:

- 1. The account type must be Analyst AND
- 2. Either the testfield must be true OR the account phone must be 1234.

#### Creating an Object that isn't Available by Default

Guide Designer knows about many of the objects you use in Salesforce. There are others that Guide Designer doesn't automatically know about. In addition, your site may have custom objects. You can add these objects

to Guide Designer using the following procedure. In this example, Contact Roles for an Opportunity are being added.

1. Go to Guide Designer Setup by pressing the "+" icon. Here's an example:

Home Getting Started Guide Desig	ner Guides 🕂
Create New	All Tabs
Recent Items	Use the links below to quickly navig te to a tab. Alternatively, you
Process new case Test Guide Visibility	View: All Tabs
<ul> <li>Test Guide Visibility</li> <li>Bob Test Opportuntity (Test Price Book)</li> </ul>	Accounts Tell me more!
Acme - 1,200 Widgets           Many Knuth	Of Account Scout
00001098	Peans Beans
Barry Kingsbury	Campaigns Tell me more!
Barry Kingsbury A David Drucker	Cases Tell me more!
	Chatter
🔯 Recycle Bin	Cloud Extend Setup
	man man man

#### 2. Click Setup.

Here's what you should see:

Home	Getting Started	Guide Designer	Guides	+		
Synch Syste	nronize Cloud Ext m	tend with Your				3
-	nchronization Sta		emo-org.com	on 02/25/2013 at 16	i:43:03	5
• (	Guides can run in	the following obj	ects			->
+ (	Guides can create	the following obj	jects			$\supset$
Syn	chronize Reset Cha	inges	J		Mar Janan	>

3. Expand the *Guides can create the following objects* section and press the **Add** button to create a new object:

Name	Display Name	Description	Fields for Selected Object Shown for
Case			Create
FeedItem	Create Chatter		Name
Note			Lead ID
Event			Deleted
Task			Master Record ID
			☑ Last Name*
Account			First Name
Contact			Salutation
Order_c			Rating
OpportunityContactRole	Create Opportunity Contact Role		Annual Revenue
			Employees
Add Remove			
hronize Reset Changes			

As you are typing "OpportunityContactRole", Salesforce displays a list from which you can select objects that are set up in Salesforce. After the name is entered, you will see the object's field on the right. Notice that required fields are checked automatically. If you want other fields to be displayed by default in the Guide Designer when doing a "Create Opportunity Contact Role", you can add them by checking their name.

4. After this object is defined, press the **Synchronize** button.

If after you synchronize, you do not see this object, try refreshing or restarting your browser.

### CHAPTER 8

## Launching a Guide

This chapter includes the following topics:

- Launching a Guide Overview, 91
- Launching Guides from a Home Page, 91
- Launching a Guide from a Salesforce Button, 92
- Launching Guides from a Calendar Event, 94
- Launching Guides from a Phone Contact, 97

#### Launching a Guide Overview

You can launch a guide from Application Integration or from Salesforce.

If you want to launch a guide from Salesforce, you must perform the following prerequisite tasks in Application Integration:

- Create a guide and select a Salesforce object in the Start > Applies To property. The guide gets associated with the object that you select.
- 2. Validate, save, and publish the guide.

**Note:** If you log in to Salesforce and do not see your guides, log out of Salesforce, clear the browser cache, and then log in to Salesforce.

You can launch the guide from the Salesforce home page or from a Salesforce button. You can also create a calendar event or a vCard in the Guide Designer, to launch a guide from your smart phone.

#### Launching Guides from a Home Page

When users log into Salesforce, they are logging into their Home page. This is a natural place from which they can launch many guides. Any guide, however, that is launched from a Home page does not have a context; that is, the guide does not apply to any object. (If it applied to the object, it would appear on the object's page.) Consequently, home page guides are often used to create Salesforce objects.

To place a guide on the user's home page, set the **Applies To** field within the **Guide Properties** dialog to **Home**.

Guide Properties		~
General P	ossible Outcome	s Guide Fields
Name:	Initial Lead Qua	lification 🧳
Applies To:	Lead 🗸	1
Description: Tags:	Event Home	omma to start ne
Run On:	Lead Note Opportunity	• 5
	Product Task	~

## Launching a Guide from a Salesforce Button

The previous topics in this section showed how you can add a button to a page and have that button launch a guide. In some cases, you want a guide to launch when a user presses a button. For example, within an Account page, pressing the "New Opportunity" button tells Salesforce to display an empty Opportunity page. This topic shows how you could instead launch a guide when the user presses the button.

#### Step 1: Create a Visual Force Page

- Select Setup > App Setup > Develop > Pages. At the top of the table that is displayed, press the New button.
- 2. Enter the label that will be used for your code. Salesforce will also automatically give it a name. You can give it another name if you like.
- 3. Add your code to this form. The following code is designed to modify the Salesforce built-in Opportunity object. It will invoke a guide called "New Opportunity". As it will be invoked from within an Account page, the objectType is set to Account. The opportunity will need to know the AccountId (which is the same as when the form is displayed when pressing the New button). The final attribute indicates the guide will display in an area whose height is 600 pixels.

Sualiorce	Page	
age Edit	Save Quick Save Car	mcel Where is this used? Cor
Page Information		
	Label ReplaceOpptNewButtd lame ReplaceOpptNewButtd	
isualforce Markup	Version Settings	and the second second
	Version Settings	
1 <apex:p< td=""><td></td><td></td></apex:p<>		

#### Step 2: Reassign the "New" Button

- 1. Select Setup > Customize > Opportunities > Buttons, Links, and Actions.
- 2. In the displayed table, select the **Edit** Action to the left of New.

Buttons,	Links, and Actions	New Action Ne	w Button or Link	Default Custom Links	S
Action	Label	Name	Description	Туре	Content Source
Edit	Add to Campaign	AddInfluence			Standard Salesforce.com Page
Edit	Clone	Clone			Standard Salesforce.com Page
Edit	Delete	Delete			Standard Salesforce.com Page
Edit	Edit	Edit			Standard Salesforce.com Page
Edit	List	List			Standard Salesforce.com Page
Edit	New	New			ReplaceOpptNewButton (Visualforce Page)
Edit 😽	Opportunities Tab	Tab			Standard Salesforce.com Page
Edit   Del	Process Apps	CE_Test		Custom Visualforce	aeOpportunityGuideMobileEnabled (Visualforce

3. In the displayed Override Properties page, go to the bottom of the form and set Visualforce Page. From the picklist, select the name of the Visualforce page This is the name you set in the previous section.

Override Pro	operties	Save Cancel
Label Name Default	New New Standard Salesforce.	
Override With Comment	<ul> <li>No Override (use</li> <li>Visualforce Page</li> </ul>	
		Save Cancel

4. Press the Save button.

#### Step 3: Test that the Guide is Launched

- 1. Open a page for an existing account.
- 2. Scroll down the Opportunities area, then press **New Opportunity**. The New Opportunity guide should launch.

## Launching Guides from a Calendar Event

Guide Designer lets you to send iCalendar files to people who will be attending an event. When it was installed, Guide Designer added an **Email Invitations** button onto Calendar Event pages that helps you do this.

Here's how you send iCalendar files to meeting participants.

- 1. Create an event in Salesforce. Generally, creating an event is separate from sending invitations, although it doesn't have to be. As you usually do when creating an event, you will identify the person the event is assigned to, the object such as an opportunity that the event is related to, and so on.
- 2. After creating the event, go to the created event's page. Here you will see an Email Invitations button.

Follow up to demo	Ş
	Edit Layout   Help for this 🛃
# # 1 7 31 « Back to List	5
	Attachments [0]
Event Detail	Edit Delete Create Follow Up Task
	Email Invitations
✓ Calendar Details	ason many more thank

3. Press this button to display a wizard.

image href="../images/EmailInvitations.png"

Instructions	Restart
A calendar invitation will be sent to Barry Kingsbury (the event owner), which includes a link to a wizard to run after the meeting.	31
Do you also want to send an invitation to the other invited participants for this event (including a link to the event page i Salesforce)?	n
Provide email addresses for any additional recipients of the in separated by semicolons:	nvitation,
Subject: Follow up to demo	
Body:	
B I ∐   ☵ ☵   非 非   ∞ ※ 또   ળ   ♥   💷   マ	
Email Invitation For Event	
Continue	

- 4. After filling out this page, click the **Continue** button. Guide Designer will now create an iCalendar file for the event, attaching it to an email that it sends to people participating in the event. **Note**: Guide Designer can create two different iCalendar files. The first is included in emails sent to people who are named as contacts, leads, and the like. This iCalendar file lets them add the event to their calendar. In contrast, the person sending the invitation receives an email that contains a link to the event. Also, if the invitees include other users who are working for your company, they also get a link to the Event object. This lets them get more information about the event. However, only the event's host (the one to which the event is assigned) can run the event.
- 5. Open the calendar attachment on your phone. (If you open it on a PC, you will need to sync it to your phone). Here is the kind of information that the person who is hosting the meeting sees on an iPhone.



6. At the time of the meeting, users can tap the link to access the guide.

## Launching Guides from a Phone Contact

When Guide Designer is installed, it added a **vCard** button onto Contact pages. After pushing this button, Guide Designer creates a vCard file that you can use to add this person to a contact list. When you are in your contact manager, the information displayed when you open the contact contains a link that when tapped displays the guides that a user can run for this contact.

Here how you do this:

1. Click the **vCard** button on a Contact page.



2. After you press this button, your browser receives a **vCard** file. Execute this file to have it be installed in Outlook or another contact manager. If you do this on a PC or Mac, your contact manager must sync with the contact information on your smart phone. Here is what a contact page looks like on an iPhone:



3. Notice the link in the home page area. Tapping this link displays the guides that you can run for this contact. If there is only one guide, Guide Designer displays that guide.

## CHAPTER 9

## **Guide Execution Reports**

This chapter includes the following topics:

- Guide Execution Reports Overview, 100
- Using the Guides Tab, 100
- Creating Salesforce Reports, 102

#### **Guide Execution Reports Overview**

This chapter describes how to view guide execution history from the Guides tab and use the Salesforce Reports feature to run a report on Guide Executions.

#### Using the Guides Tab

To view guide execution history from the Guides tab:

 Locate the Guides tab in the Salesforce menu. You may need to click the + sign and choose it from the list of options. The following page opens:

Home	Chatte	er Files	Leads	Accounts	Contacts	Opportunities	Reports	Dashboards	Products	+	•	
V	All 🔻	Create New	/ View								-	0
New	Guide	Change Own	er 🗘	A	B C D E	F   G   H   I   J   K	L   M   N   O	P   Q   R   S   T	U   V   W   X	Y   Z	Other	AII
A	ction	Name 🛧										
E	dit   Del	NetSuite De	mo Guide									-
E	dit   Del	New Case S	Set Up									
E	dit   Del	new home o	quide									
E	dit   Del	Package Tra	acking									
E	dit   Del	Process Inv	oice									
E	dit   Del	Request Sp	ecialist									
E	dit   Del	Resolve Ca	se									
E	dit   Del	Select Acco	unt for Nev	Opportunity								-
												F

**Note:** The Salesforce controls on this page apply only to the list. You must open Guide Designer to use the guide design features.

2. Click on the guide you want to view to see the execution details, as shown in this image:

						Customize Page   Edit	Layout   Printable '	View   Help for this Page
Back to	List: Guides							
		Guide	Executions [5] Oper	n Activities [0]   A	ctivity History [0]   Guide Tran	islation [0]		
Guide [	Detail	E	dit Delete Clone	]				
	Name	NetSuite Demo Guide			Sta	tus Published		
	Applies To	Home			Last Publis	ned 6/30/2015 1:28 PN	1	
	Guide Design	Open			Ow	ner 🙂 Chris Keller [C	hange]	
	Created By	Chris Keller, 6/30/2015 1:2	8 PM		Last Modified	By Chris Keller, 6/30/	2015 1:28 PM	
		E	dit Delete Clone	]				
	recutions	N	w Guide Execution					Guide Executions Help
Juide E				Status	Start Time	End Time	Outcome	Running Guide
	Name	Run On	Run On Type	Status				
Action	Name NetSuite Demo Guide	Run On Kellie Delaney	Run On Type User	Completed	10/2/2015 9:11 AM	10/2/2015 9:11 AM		
Action Edit   Del					10/2/2015 9:11 AM 10/2/2015 9:11 AM	10/2/2015 9:11 AM 10/2/2015 9:11 AM		
Action Edit   Del Edit   Del	NetSuite Demo Guide	Kellie Delaney	User	Completed				
Action Edit   Del Edit   Del Edit   Del Edit   Del Edit   Del	NetSuite Demo Guide NetSuite Demo Guide NetSuite Demo Guide	Kellie Delaney Kellie Delaney	User User	Completed Completed	10/2/2015 9:11 AM	10/2/2015 9:11 AM		

From this page, you can:

- Click Guide Design in the header to open the guide in Guide Designer.
- Click the guide name in the list to display a Salesforce detail page for the selected guide.
- Click the name in the **Run On** column to see information about the user account that run the guide.
- Click Open in the Running Guide column if the guide is still executing and view the guide in progress.

#### **Guide Details**

If you click Name in the Guide Executions list, the following details page displays:

Guide Execution	emo Guide		<b>A</b>
« Back to List: Guides		Customize Page	Edit Layout   Printable View   Help for this Page 🧐
	G	uide Milestones [0]	
Guide Execution De	Edit Delete Clo	ne Execution Log	
Name	NetSuite Demo Guide	Guide	NetSuite Demo Guide
Run On	Kellie Delaney	Starting User	Kellie Delaney
Run On Type	User	Start Time	10/2/2015 9:11 AM
Status	Completed	Ending User	Kellie Delaney
Running Guide		End Time	10/2/2015 9:11 AM
Outcome		Owner	Kellie Delaney [Change]
Created By	Kellie Delaney, 10/2/2015 9:11 AM	Last Modified By	Kellie Delaney, 10/2/2015 9:30 AM
	Edit Delete Clo	ne Execution Log	
Guide Milestones	New Guide Milestone	•	Guide Milestones Help 🥐
No records to display			

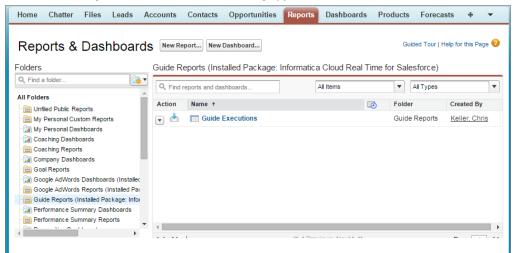
Several options are available to manage the execution reporting history. For example, you can:

- Click **Delete** if you no longer need this history. However, note that if you delete the guide history from this page, you must republish the guide in Guide Designer before it is available for execution.
- If the guide includes milestones, click Milestone to display a detail page for the milestone.
- Click **Execution Log** to log in to Informatica Cloud[®] and review the guide execution log in the Application Integration Console.

## **Creating Salesforce Reports**

To use the Salesforce Reports feature to run a report on Guide Executions:

- 1. Choose the **Reports** tab in Salesforce (or click the + sign to locate it).
- 2. Choose **Guide Reports** from the list. The following appears:



3. Click **Guide Executions** to run the report and view options to change report parameters. Use the Salesforce commands on this page in the same way you would use them on other report pages.

종 Guide Exe	cutions						
Report Generation Status:	Complete						
Report Options:		ime Frame —					
	how	ate Field Last Published	▼ Curre From 4/1/2	ent FQ To	<b>▼</b> 13		
Run Report Hide De	tails Customize Sa		Delete	Printable View	Export Details	Outcome	Running Guide
		Run On Type Opportunity	Status Completed	Start Time + 6/28/2013 8:08 AM		Outcome	Running Guide
Name	Run On	Run On Type	Status	Start Time 🔸	End Time		Running Guide
Name Add Products to Opportunity	Run On Replaciong Broken Parts	Run On Type Opportunity	Status Completed	Start Time ↓ 6/28/2013 8:08 AM	End Time 6/28/2013 8:11 AM	-	Running Guide - -
Name Add Products to Opportunity Add Products to Opportunity	Run On Replaciong Broken Parts Replaciong Broken Parts	Run On Type Opportunity Opportunity	Status Completed Completed	Start Time + 6/28/2013 8:08 AM 6/28/2013 8:07 AM	End Time 6/28/2013 8:11 AM 6/28/2013 8:08 AM	-	Running Guide - - -
Name Add Products to Opportunity Add Products to Opportunity Add Products to Opportunity	Run On Replaciong Broken Parts Replaciong Broken Parts Replaciong Broken Parts	Run On Type Opportunity Opportunity Opportunity	Status Completed Completed Completed	Start Time + 6/28/2013 8:08 AM 6/28/2013 8:07 AM 6/28/2013 8:07 AM	End Time 6/28/2013 8:11 AM 6/28/2013 8:08 AM 6/28/2013 8:07 AM		Running Guide - - - -
Name Add Products to Opportunity Add Products to Opportunity Add Products to Opportunity Add Products to Opportunity	Run On Replaciong Broken Parts Replaciong Broken Parts Replaciong Broken Parts Replaciong Broken Parts	Run On Type Opportunity Opportunity Opportunity Opportunity	Status Completed Completed Completed Completed	Start Time + 6/28/2013 8:08 AM 6/28/2013 8:07 AM 6/28/2013 8:07 AM 6/28/2013 8:02 AM	End Time 6/28/2013 8:11 AM 6/28/2013 8:08 AM 6/28/2013 8:07 AM 6/28/2013 8:07 AM		Running Guide